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# Valuing Stakeholder Knowledge: An Interpretive Study of Knowledge Cultivation and Enablement in a Nonprofit Human Services Organization

Jennifer Aden Murnane  
*Iowa State University*

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**Valuing stakeholder knowledge: An interpretive study of knowledge  
cultivation and enablement in a nonprofit human services organization**

by

**Jennifer Aden Murnane**

A dissertation submitted to the graduate faculty  
in partial fulfillment of the requirements for the degree of  
DOCTOR OF PHILOSOPHY

Major: Family & Consumer Sciences Education

Program of Study Committee:  
Cheryl O. Hausafus, Co-Major Professor  
Sue L.T. McGregor, Co-Major Professor  
Beverly J. Kruempel  
Mack Shelley  
Margaret C. Torrie

Iowa State University

Ames, Iowa

2008

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## **ABSTRACT**

This study focused on the issue of tacit knowledge management and its value within a large, nonprofit human services organization. The research explored how the organization uses tacit knowledge cultivation and knowledge enablement to achieve its organizational mission. This research was conducted using a naturalistic methodology within the interpretive paradigm. Trustworthiness criteria, including credibility, transferability, dependability, and confirmability, were used to ensure rigor in the research. Prolonged engagement in the research was achieved by a 12 week (81 hours) data collection time frame.

The data collection methods employed in the study included 9 interviews representing organizational volunteers, employees, and board members; 12 direct observations of organizational knowledge management activities; and, the analysis of 34 documents. Thematic analysis and constant comparative analysis were used in tandem to develop three levels of codes in analyzing the data, including open codes, axial codes, and selective codes.

The themes found as a result of the analysis were that the organization relies on experiences and collaborative relationships; the organizational strategy is aligned with its knowledge sharing practices with consistent learning strategies employed as well; and, stakeholders function as community members and have mission connectedness. A conceptual framework was developed to illustrate the elements inherent in this organization's tacit knowledge cultivation and knowledge enabling environment.

## CHAPTER 1. INTRODUCTION

As society has moved from that of an industrial one to more of a knowledge-based one, the dependence on output of goods and services has shifted from machine and physical labor output to intellectual output (Weatherly, 2003). In other words, the focus has shifted from merely placing value on physical output to valuing intellectual capital input. As organizations concentrate more on retaining and cultivating the talent of their employees, it has become increasingly important to attempt to show the value of the intellectual facets, particularly the tacit knowledge, that people bring to an organization, or take with them when they leave. The tacit knowledge, including individual know-how, beliefs, experience, perspective and values that someone brings to an organization, has not been addressed in terms of traditional paradigms in the financial arena for a variety of reasons. However, it is important for the longevity of an organization and its mission to preserve and transfer this knowledge if it is to add value to the organization and its stakeholders.

### *Problem Statement*

Due to economic and various other factors impacting the nature of the employment relationships within organizations, the loyalty between companies and employees has diminished over the years. Employees can leave an organization voluntarily, involuntarily, and for a variety of reasons within each of these categories. No matter how effective an organization is at retaining its employees, the reason to leave is sometimes beyond the organization's control, as in situations such as employees' families moving or health problems (Campion, 1991).

Toossi (2006) notes, as a major change characteristic over the next 50 years that, “significant numbers of the older age groups in the workforce will be retiring, resulting in a loss of much-needed skills and significant amounts of institutional knowledge” (p. 21). The metropolitan areas of the Northeast United States, at the time of the 2000 census, had one in nine workers between the ages of 55 and 64 who generally possessed higher levels of skill and an above average amount of higher education (Gottlieb, 2004). He suggests that policy makers should consider “shifting their emphasis from increasing the quantity of certain types of workers, toward embracing human capital development as a longer-term goal” (¶7).

The consensus is that employers are not addressing the problem of the baby boomers retiring (those individuals in the United States born between the years of 1946 and 1964) with regard to valuing and capturing the knowledge of this highly skilled and educated generation. Additionally, those in the younger workforce are becoming more and more mobile and, as a trend, are not staying with one employer for a long period of time (average of three years) (U.S. Department of Labor, 2008). A survey of 2,046 human resource executives about their organizations’ practices of transmitting knowledge from retiring baby boomers to others within the organization found that 23% of organizations do this informally, 4% do this formally, 29% do not pass on the knowledge, and 44% have no plans to transfer the knowledge from retiring baby boomers (Online Recruitment, 2007; Toossi, 2006).

The fact that knowledge is so vital to an organization today is evidenced by the surge of Internet-based and other inventive organizations where employee knowledge is more important than the productivity in terms of quantifiable labor.

Along with more dynamic organizations and services comes more dynamic movement of the workforce with people changing jobs at an increasing rate. This movement renders knowledge management a critical action on the part of organizations in order not to lose ground; it is necessary to capture this knowledge that is so vital to the organization. The problems of highly skilled workers retiring and the shortage of younger workers have been a topic of discussion with regard to both the needed increase in the labor supply and the overall increase in human capital development as a goal to compensate for the lost organizational knowledge (The Brain Drain, 2004; Gottlieb, 2004). It is also critical that the lost knowledge cannot be replaced with the same knowledge. The workplace and surrounding environments are constantly changing, and the required knowledge must evolve with these changes in order to be relevant (McGregor, 2006).

In my position as the Assistant Director for Bellevue University's Human Capital Lab, I have the opportunity to conduct applied research within organizations and serve as the interface between corporations and the lab's other faculty researchers (see Appendix A for my curriculum vita). As a result of this position, I have immersed myself in the literature of human capital management and, more specifically, the value that it provides organizations in terms of impacting business outcomes. Through my inquiry and exposure to human capital management I became interested, from an interpretive perspective, in how organizations value the knowledge that individuals bring to their organizations and, more importantly, how they capture and transfer the value-producing knowledge capabilities of employees who leave an organization.

Very few studies have been done in the area of knowledge management within nonprofit organizations, which is one of the three sectors in the economy along with the governmental and for-profit sectors, and none have specifically focused on tacit knowledge management of all stakeholders within this unique sector. Additionally, there have not been any knowledge management studies done concerning family-oriented organizations that could contribute to the practice of family and consumer sciences education, although these studies are recommended by McGregor (2006).

### *Research Questions*

This research focuses on the place that knowledge management, specifically knowledge cultivating and enabling processes have in a nonprofit organization, as a mission-driven entity. The research questions addressed are as follows:

- (1) What knowledge cultivation and knowledge enabling processes exist within a nonprofit human services organization, and how do these processes contribute to mission achievement?
- (2) To what extent does a nonprofit human services organization depend on a combination of explicit and/or tacit knowledge to achieve its mission?
- (3) What contributions do stakeholders (employees, board members, and volunteers) of a nonprofit human services organization make to the knowledge cultivation and knowledge enabling process in order to achieve the organizational mission?



### *Definition of Terms*

The following definitions are offered to assist the reader and clarify understanding:

**Knowledge cultivation:** leadership role of organizations in nurturing knowledge as it contributes to creation and innovation; also a key component of knowledge enablement.

**Knowledge enablement:** realization that individuality of human knowledge in shaping the organization and its environment relies on the development of tacit knowledge.

**Tacit knowledge:** knowledge stored in people's brains including individual know-how, beliefs, experience, perspective and values that someone brings to an organization.

**Explicit knowledge:** written knowledge in the form of documents, data, and policies, and procedures that can easily be shared.

### *Purpose*

The purpose of the study was to explore how knowledge is managed within a large nonprofit human services organization and how this knowledge is valued within the organization. Knowledge is observed according to its classification of tacit or explicit and how the two forms of knowledge work in conjunction through the various organizational venues and activities promoting the generation and sharing of such knowledge. The research is focused on tacit knowledge sharing toward mission achievement. In order to examine the context and place of tacit knowledge in the

organization, I also studied explicit knowledge so that I could fully understand the relationship between the two as part of the organization's knowledge management practices.

### *Organization of Dissertation*

This dissertation includes six chapters: the introduction, literature review, methodology and methods, data analysis process and transitional findings, discussion of emergent insights, and recommendations. The introduction gives the reader insight into the problem and need for the research. The literature review discusses knowledge management, the uniqueness of nonprofit organizations, and tacit knowledge management studies explored in business, social science, education, and other fields.

The methodology and methods chapter provides justification for the overarching framework and research design for the study. It also discusses the epistemological, ontological, and axiological aspects of the methodology, as well as the attendant research methods and procedures.

The data analysis process and transitional findings chapter discusses the analytic process and thematic analysis results developed from the research. The Case Report Discussion and Emergent Insights chapter presents the case report as framed by the research questions and overall findings. The final chapter includes recommendations as to the validation and limitations of the research as well as implications for future research in this area.

## CHAPTER 2. LITERATURE REVIEW

Three primary bodies of knowledge are addressed in this literature review: (a) knowledge management as a function of intellectual and human capital management; (b) nonprofit organizational design and behavior, to gain perspective on the uniqueness of this sector in relation to the for-profit and governmental sectors; (c) and, tacit knowledge management in both nonprofit and for-profit organizations. Multi-disciplinary literature was reviewed in the fields of family and consumer sciences, education, public policy, human resources, accounting, management, organizational behavior, organizational development, knowledge management, public administration, library science, leadership, and information technology. The text is organized using the following headings: knowledge management literature, nonprofit organizational literature, and tacit knowledge management studies.

### *Knowledge Management*

This section discusses the various types of knowledge and tacit knowledge's relationship to human capital. The relevant literature on the topic of knowledge management includes its value to the organization and the various applications of knowledge management used in organizations.

### *Knowledge Defined*

Knowledge is defined as "awareness or familiarity gained by experience" (McKinsey & Company, 2003, p. 2). Knowledge acquisition has been deemed to

occur when “information has acquired a place in the reference framework of the user and the user connects this with his *[sic]* own actions” (Zolingen, Streumer, & Stooker, 2001, p. 411). Various forms of interconnected knowledge exist within individuals and are utilized in any organization. They are discussed in detail below.

There are three types of organizational knowledge, which are mutually dependent on one another. They include: cultural, explicit, and tacit knowledge. All three types work together to create organizational advantage (Choo, n.d.), and each is discussed here. Freeze and Kulkarni (2007) characterized implicit knowledge as an additional type of knowledge, defining it as tacit knowledge, which is developed at a more unconscious level and is more able to be made tacit. But, the authors note that implicit knowledge is not recognized in knowledge management and information systems literature as it is still considered a form of tacit knowledge. As a result, future references to implicit knowledge will be considered tacit knowledge for the purposes of this study.

*Cultural knowledge* is based on those activities in the organization that allow people to translate new ideas into meaningful output and share this with others in the organization (Choo, n.d.; McGregor, 2006). Cultural knowledge can be communicated in verbal or written form but is dependent on others within the organization to perpetuate this widely-held knowledge (Dow, 1997).

*Explicit, or codified, knowledge* is the more formal use of people’s knowledge, skills, and abilities. It has been given meaning and can be translated and conveyed to others through written or verbal communication, and it is not dependent on the

author to disseminate its meaning (Barclay & Murray, 1997; Choo, n.d.; Luthans, Youssef, & Avolio, 2007; McKinsey & Company, 2003; Skyrme, 1997).

*Tacit knowledge* is informal and implicit. It is the inner workings of people's brains and the personal knowledge, beliefs, experience, perspectives, and values that they use to do their jobs as well as to form meanings about the organizational structure, values, culture, and processes (Barclay & Murray, 1997; Choo, n.d.; Luthans et al., 2007; McKinsey & Company, 2003). Tacit knowledge is not easily put into words to communicate to others but can occur by observing others and learning on the job (Gratton, 2004; Skyrme, 1997). It often is not conveyed until the author chooses to do so. In the case of service organizations, tacit knowledge requires personal interactions with others before it can be converted into a source of value for the organization (Namasivayam & Denizci, 2006); hence, it is considered "knowledge-in-practice" (McAdam, Mason, & McCrory, 2007, p. 46).

#### *Tacit Knowledge and Human Capital*

The tacit knowledge aspect of human capital is complex because it cannot easily be seen, understood, or explained (Kanter, 1999; McAdam et al., 2007). Although tacit knowledge is not easily converted to externally shared knowledge, it is important to try and do so in order to find out how someone goes about doing his or her job (Mitstifer, 2000a). According to Gratton (2004), in some industry sectors, tacit knowledge is considered "of immense importance to the individual and much organizational emphasis, particularly with mentoring and coaching, is focused on enabling others to learn from the tacit knowledge held by one person" (p. 86). Tacit

knowledge can be the driver of innovation and its management is crucial to organizations in order to stay abreast with the codified knowledge that technology and organizational systems are using (Dreikorn, 2007; Houghton & Sheehan, 2000).

Placing value on the implicit aspects of a person's psyche is difficult, although intuitively one would hope that the experience and education one absorbs contributes to decision making, creativity, idea generation, employee morale, and many other factors that are arduous to quantify, yet are paramount for the profit, growth, market position, mission development, achievement, and advancement of organizations. The practice of knowledge management attempts to address the issues associated with this value to an organization.

### *Managing Organizational Knowledge*

Knowledge management is concerned with how organizational knowledge is created, obtained, stored, and distributed, internally and externally (Liebowitz, 1999). Knowledge management is used to advance the articulated and aggregated knowledge within an organization as defined in the following areas in the framework for Knowledge Organizations: (a) education, experience, and training; (b) skills and knowledge; (c) articulated knowledge; (d) aggregated knowledge; and (e) improvement levels. The Knowledge Organization concept describes an organization in which systems and processes are used to generate, transform, manage, use, and transfer knowledge in alignment with the goals of the organization (Aliaga, 2001).

Education, experience, and training are foundational elements for employees within the organization to build upon and enhance, and they lead to the development of other framework components. Skills and knowledge are considered to be the gains and results of education and training. Articulated knowledge is that which is shared with other employees and used within the organization's strategic framework to link it to that of other events and employee knowledge within the organization. Aggregated knowledge is the organization's ability to compile and transform knowledge into innovation, in the form of new products, process improvements, and other strategic outcomes for the organization. Improvement levels consist of improving functions for those in the organization at all levels, relationships within the organization, and system flows to be able to adjust to articulated and aggregated knowledge (Aliaga, 2001).

### *Relevance for Family and Consumer Sciences*

Mitstifer (2000b) challenged family and consumer sciences (FCS) professionals to consider how knowledge management could inform their practice. She states that the focus placed on this topic has enhanced the value of learning and experience, and she urges FCS professionals to consider the treatment of learning and experience as durable assets for personal and professional growth. Some organizations do not reward knowledge sharing; those who do reward it avoid replication that happens because of protected knowledge and focus on generating new knowledge for the organization. McGregor (2006) built on Mitstifer's work and

proposes that knowledge management is a mechanism for the profession to share the personal knowledge of individuals with the larger group.

Aside from Mitstifer (2000b) and McGregor's (2006) work in broadly applying knowledge management to FCS, there is a lack of research surrounding how knowledge management can enhance the FCS profession or, for that matter, organizations contributing to the mission of the profession in preserving and proliferating the tacit knowledge of its members. This knowledge preservation is important. It ensures there are no service interruptions or quality differences experienced by the families and individuals served by an organization just because someone leaving an organization does not share his or her internal knowledge and the continuity of organizational endeavors upon his or her exit.

According to McGregor (2006, p. 334), "the need for knowledge management has been triggered by the relentless pace of change in society and organizations, making information outdated and knowledge more valued." Applying knowledge is integral to any organization. Knowledge management involves the sharing and dissemination of knowledge to achieve best practices, conduct identification and mapping of knowledge within an organization, and attempt to achieve cost savings for reduced efforts (Barclay & Murray, 1997).

### *Valuing Knowledge Management*

Zolingen et al.'s (2001) work in the area of knowledge management for corporations focused on five cyclical steps in the knowledge management process: acquiring, codifying, disseminating, developing, and applying. The researchers



stated that to acquire the knowledge is to bring this knowledge to the organization.

Codifying involves making the knowledge explicit and able to be acquired by others at any given time or place; it entails writing it down in an organized way.

Dissemination of the knowledge involves getting it to the right people in the organization for their use in performing their jobs. Development of knowledge is a product of using existing knowledge and forming new insights into its use.

Application of the knowledge involves putting it into practice within the organization.

The authors contend that organizational structure, culture, strategy, and knowledge systems contribute to how well an organization manages its knowledge. Zolingen et al. gleaned their insights from a case study of a publicly traded company, in which they explore the results and problems of the company's knowledge management process within their five-component knowledge management process framework; however Zolinger et al. did not explore what actually brings value to the organization more holistically.

Valuing intangible assets is difficult for businesses. But, this valuation is necessary to make the best decisions about the future regeneration and development for the organization. The first step to value an intangible asset, according to one study in measuring organizational knowledge, is to fully understand which specific knowledge assets are driving organizational performance and then align those assets with the organizational value chain (Green, 2006). Green proposed a framework known as the Framework of Intangible Valuation of Assets (FIVA), which uses the balanced scorecard and business value chain models. The framework aligns performance-based activities with value components to arrive at an

Intangible Asset Taxonomy (IAT) of drivers of value for intangible assets, which, in turn, identify a set of knowledge management objectives. According to Green, “understanding the value of its intangibles helps a business to develop, sustain, and enhance its mission effectiveness and/or competitive advantage” (p. 32). Green’s earlier study (2004) of information technology firms in the Washington, D.C. area explored the objectives of knowledge management and the value drivers of intangible assets. The intangible asset value drivers identified in her framework are customer, competitor, employee, information, partner, process, product or service, and technology. The objectives of knowledge management, according to Green, are innovation, organization, socialization and culture development.

It is important for organizations to reflect with great rigor their business knowledge and how it is created and simulated in terms of various processes and activities within the organization. Aligning intangibles with strategic goals and objectives and linking knowledge assets to work functions and processes are also important. The more that people in an organization know about the interaction between customers, products, technologies, and markets, the better they can be at making accurate decisions and helping the organization perform to its highest potential (Andreou, Green, & Stankosky, 2007).

The end result of knowledge management systems or processes is that they create value in the form of new patents, new processes, efficiency savings measured by money or time saved, increased profits, growth in revenue and return on investment, and improved innovation capabilities (Bell, 2003). The value to the firm is based on its particular focus, which can be related to things such as customer

intimacy, efficiency in operations, or innovative product development. Although the specific focus can change over time, it will always be aimed at increasing the profitability of the organization (O'Dell & Grayson, 1998).

Andreou et al. (2007) presented the first step in an intangible asset valuation model that analyzes all of the knowledge that is important to an organization. They use two key questions in the development of this asset valuation approach within various performance areas. The questions are “(a) What is the performance/learning focus area resulting from the interaction of the employee-‘value driver?’ and (b) What knowledge do employees need to leverage within that focus area?” (p. 58). The study was done with federal government contractors to explore critical success factors for accomplishment of value generation in organizations. During the study, the researchers developed a list of operational knowledge assets to test in an attempt to understand what was activating the human capital performance’s impact on organizational value.

### *Information Technology and Systems View of Knowledge Management*

The interdisciplinary nature of knowledge management is evident by its presence in various fields’ literature ranging from education, organizational science, decision support systems, library science, and artificial intelligence. The literature in these disciplines does not address the transformation of tacit into explicit knowledge nor does it focus on studies of organizations attempting to or not attempting to do this (Barclay & Murray, 1997, McGregor, 2006). Literature discussing the application

of knowledge management is predominantly found in the information technology (IT) field, focusing on the management of explicit knowledge.

The IT and systems view of knowledge management is one that is directed at the supply chain of knowledge in designing systems to try and manage and utilize explicit, implicit, and tacit organizational knowledge (Freeze & Kulkarni, 2007).

Freeze and Kulkarni classified five knowledge capabilities and suggested balancing all of the capabilities within the organization as a framework for managing knowledge. The capabilities include the following: expertise, knowledge documents, lessons learned, policies and procedures, and data. Within these five knowledge capabilities, there are varying ranges of explicit, implicit and tacit components. Expertise is considered to be implicit and tacit because it is acquired through experience, formal education, and collaboration. Knowledge from lessons learned starts off as implicit knowledge but can be codified to later become explicit, while knowledge documents are inherently explicit. Policies and procedures arise from tacit knowledge, which can then be made explicit, and data are viewed as tacit knowledge, which is then turned into business intelligence.

The overall focus on tacit knowledge management within the IT and decision support fields encompasses the process of codifying and transferring knowledge, not the attendant organizational and cultural aspects of the process. The emphasis of knowledge management programs has been on turning tacit into explicit knowledge and to identify, develop, share and take advantage of knowledge for organizational use. Knowledge management has been prevalent in knowledge-intensive firms

such as those in the areas of information technology, oil and gas, chemical, pharmaceuticals, financial services, and consulting.

When making a distinction between knowledge and information, as much of the IT research on knowledge management is directed, information can be transmitted through technological means but knowledge cannot. What separates knowledge from information is “the human cognitive dimension and tacit knowledge” (Skyrme, 1997, p. 26). Skyrme discussed typical initiatives in the area of knowledge management and suggests looking at the leadership, or development and cultivation of knowledge, as opposed to the control of it from a process standpoint. Leadership, when supported by the appropriate organizational structure, is important in nurturing creation and innovation in knowledge management practices (Skyrme).

### *Knowledge Management Applications*

A lot of attention has been given to the topic of knowledge management in training and human resource literature, with specific applications in large, public companies such as Bristol-Myers Squibb, Microsoft, and KLA-Tencor, where the focus is on the content of the employees’ knowledge and not the technology. In these studies, researchers noted that knowledge management should not be unfounded and developed without context; rather, it should be directed at solving a particular business problem in an organization (Gordon, 2005). For example, Caterpillar, Inc. developed a knowledge-sharing platform called the Knowledge Network to address the impending retirement of a large percentage of the company’s leadership in 1999. The Knowledge Network was an attempt to capture

the tacit knowledge of employees, dealers, suppliers, and other stakeholders, and the network encouraged employees to share knowledge through communities of practice, knowledge entry postings, community bulletin boards, lessons learned search tools, and designation of over 9,000 defined experts (Boehle, 2007).

The Knowledge Network is just one example; much literature has discussed how an organization can best go about harvesting or capturing tacit knowledge. Eisenhart (2001) recommended the use of the following methods when attempting to harvest organizational knowledge: (a) determine what knowledge the organization wants to capture and the reason for doing so; (b) identify experts and study information relating to the experts' positions; (c) conduct interviews with the organizational experts; (d) organize information as it relates to tasks to be accomplished; (e) convert the harvested knowledge into a tangible format so that it can be accessed; (f) share knowledge with employees impacted by its use; (g) encourage employees to access and use the harvested knowledge for current job tasks; and (h) set up mechanisms to change and update information storage areas. She also noted that "there is no benchmark for how long it may take to prepare an organization to share its knowledge" (p. 54).

Some companies have had difficulties implementing knowledge management, especially where global teams exist, even though "the abstraction of knowledge, both tacit and explicit, of the teams that make up the organization, is seen as a critical competitive factor for emerging transnational businesses" (Bell, 2003, p. 44). Some of the difficulties companies face stem from territorial attitudes, conflicting priorities, loss of influence over the process, and lack of knowledge sharing. To

attempt to overcome those difficulties, Shell Exploration and Production International uses a dedicated intranet that allows employees to take part in online discussion groups for different “communities of expertise” (Bell).

Also addressing the knowledge management obstacles, a lot of long-standing human resources practices have been developed: accumulating a supply of employee competencies, looking for gaps in those competencies to meet strategic objectives, developing ways to address the skill or knowledge gap, developing reward and recognition systems tied to gaining the knowledge, and applying the newly acquired capabilities (Dzinkowski, 2000). Additionally, having strong leadership of knowledge at all levels of the organization and a culture supporting knowledge is critical for organizations wanting to successfully employ knowledge management. Leadership of knowledge entails ongoing development of individual skills (critical to knowledge development) information resources, and knowledge and learning networks (Skyrme, 1997). The concept of knowledge management, or leadership, is an important aspect of the greater area of intellectual and human capital management. These concepts are discussed in the following sections.

### *Intellectual Capital*

Intellectual capital is defined as “all the value creating elements in an organization that are not captured by the traditional balance sheet, but are of critical importance to the future profitability of that organization” (Barge-Gil, Lemus-Torres, Nunez-Sanchez, & Modrego-Rico, 2007, p. 558). Gratton (2004) identified four elements necessary for building intellectual capital within an organization: (a) the

ability to build explicit knowledge through training opportunities; (b) the ability to build tacit knowledge through mentoring relationships, where experienced employees coach and mentor newer employees; (c) the capacity to build company specific knowledge along with opportunities to deploy this knowledge throughout the organization; and (d) the resources to sustain and encourage individual reflection, reading, and learning on the employee's own time.

For purposes of paralleling the majority of the organizational literature, Figure 1 illustrates the framework I used concerning what comprises the intellectual capital of an organization. It consists of the following three components:

organizational/structural capital, which is related to the organization;

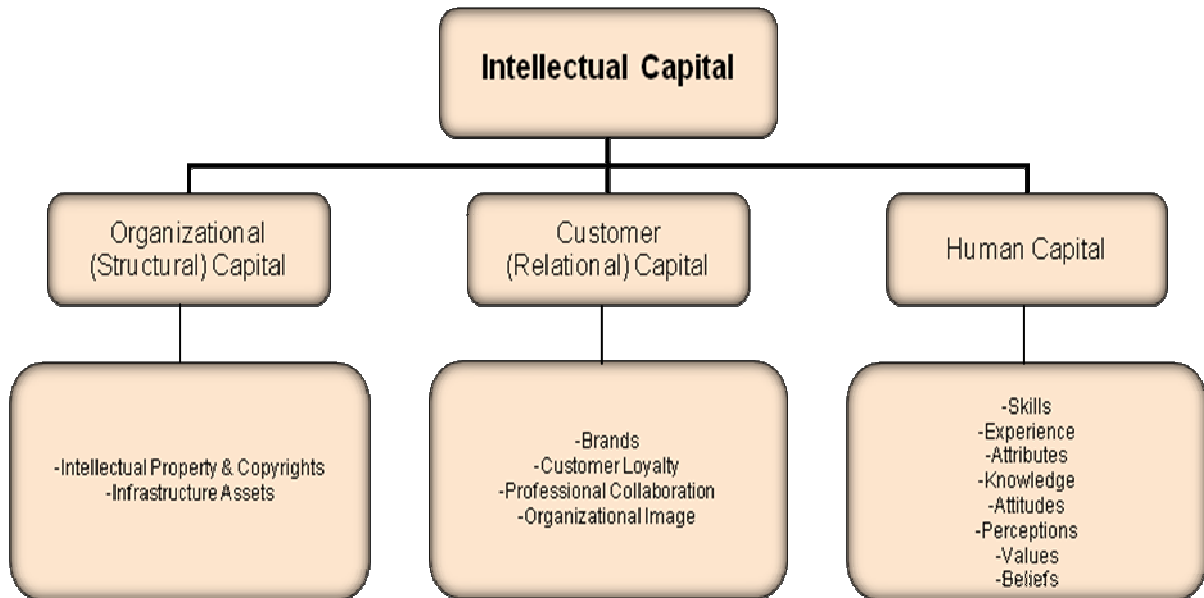
customer/relational capital, which is based on customer interactions; and human

capital, which is related to those who are employed within the organization (Barge-Gil et al., 2007; Dzinkowski, 2000; Stovel & Bontis, 2002). Organizational

(structural) capital can be transformed into intellectual property and the assets of an organization (Edvinsson & Malone, 1997), while customer (relational) capital results in organizational building of customer loyalty, brands, organizational image, and professional collaborations (Dzinkowski, 2000). Human capital is discussed in greater detail in the next section because of its importance and value in the overall organization, given the existence of a knowledge-driven society and associated contributors to organizational value.



Figure 1. Intellectual Capital Components



### *Human Capital*

The employee or human focus has been gaining ground lately in light of the organizational issues of an aging workforce and a more mobile workforce involving frequent career changes. Therefore, increasing importance has been placed on replacing what is lost when a worker retires or changes jobs. The concept of human capital, as it relates to an organization, includes the “collective sum of the attributes, life experience, knowledge, inventiveness, energy, and enthusiasm that people invest in their work” (Weatherly, 2003, p. 1). Other components have been added to the definition of human capital including know how, capabilities, expertise, personality, competencies, skills, qualifications, ability to learn, and network of contacts (Dzinkowski, 2000; Mayo, 2005). Normally, human capital increases over

time except in cases where the knowledge and skills employees possess become obsolete and unnecessary (Mayo, 2005).

Some authors (Edvinsson & Malone, 1997; Gratton, 2004; Milost, 2007) feel that intellectual capital components are all tied to human capital. The Value Platform model, developed by Edvinsson, St. Onge, Armstrong, and Petrash (as cited in Edvinsson & Malone), addresses human capital's role as a foundational element to grow organizational capital. As well, it serves as a catalyst in the relationship between human and organizational capital to create customer capital. It is at the convergence of these three forms of capital that the value creation of an organization occurs.

According to Gratton (2004), human capital of the individual employee comprises (a) intellectual capital, which translates into explicit knowledge and learning potential within the organization; (b) emotional capital, based on self-awareness, resilience, and integrity, which become insight and energy to the organization; and (c) social capital, which comprises authenticity, relationship-building, and trustworthiness, all contributing to relationship ties to and within the organization. Milost (2007) suggested that all of the components of intellectual capital are related to human capital, since structural and relational capital result from the employees' contributions to the organization and the quality of their work. If an employee leaves an organization, he or she takes all three intellectual capital aspects with him or her. Milost, therefore, contended that the only correct way to evaluate an organization's intellectual capital is to focus on the vital one – human capital (Milost, 2007).

### *Valuing Human Capital*

According to Milost (2007), “successful business operations are largely the result of the quality of its employees” (p. 135). Currently, corporations’ treatment of human capital has been guided by financial accounting standards as defined by Generally Accepted Accounting Principles (GAAP) (Green, 2006). Within GAAP, a good universal method for quantifying human capital does not exist, nor does GAAP give value to the investments an organization makes in human capital-related expenditures, aside from treating them as current period expenses (Echols, 2006). The economic community acknowledges that a paradigm shift is necessary if organizations are to place value on something that they feel is driving the organization.

Thus, the concept of human capital providing value to an organization is an emerging topic, and this intangible asset is viewed as contributing to organizational goals and objectives. In one study, Laroche, Merette, and Ruggeri (1999) suggested that the quality of human capital can vary by organization due to the following eight human capital tenets: (a) there is an innate and acquired component of human capital involving physical, intellectual, and psychological characteristics specific to each individual; (b) human capital cannot be traded or exchanged; (c) human capital may not be a planned decision as to when it is acquired, as often times parents or other societal influences help to choose the timing of human capital decisions for individuals; (d) human capital can be gained in formal settings or more informally through unplanned forms of education and experience opportunities; (e) human capital can be identified by quantitative aspects, such as the amount of time

required to complete a course or daily caloric intake, which may relate to knowledge and energy level respectively, and also by qualitatively evaluating them based on the type of education and experience obtained and from where it was obtained; (f) human capital can be generalized when it is applied to various activities and employment settings without diminishing its value or it can be specialized if its usefulness is limited to one employer or particular activity; (g) the knowledge and abilities that one possesses may not be fully employed due to the nature of particular employment in which one is engaged; and (h) human capital can influence others in the organization and is able to influence productivity as well.

Some authors (Davenport, 1999; Gratton, 2004) have contended that employees should be considered as investors instead of assets because they are investing their own personal human capital in an organization in the hopes of increasing their value. There is an emphasis on investing in individuals' human capital to increase their value to the organization and in turn the stakeholders of the organization (Mayo, 2005).

It is also noted that the value of human capital is defined by four major forces in the external world, including stockholders, investment analysts, employees, and executives (Echols, 2007). The focus on employees is studied in greater detail as this is something that is consistent among all organizations and not just those who are public corporations concerned about stockholders and investment analysts. For example, the U.S. Department of Education (2004), in its Human Capital Management Plan, outlines the current and planned actions with anticipated results and asks that "the Department's leaders make human capital management a priority,

integrated with performance and financial management” (p. 9). The Department of Education also acknowledges that the human capital initiatives it seeks to implement must be aligned with the organization’s strategic goals and leadership styles. The Department places a priority on coherent plan results, succession planning, and development, as well as effective filling of vacancies. Every organization has different stakeholders, in addition to employees, including boards of directors, volunteers, customers, and suppliers, which all can impact in their own unique way the value that human capital brings to an organization.

In addition to human capital, knowledge capital has been addressed as a source of value in the organization. In a recent report by the Federal Reserve Board, Corrado, Hulten, and Sichel (2004), discussed human capital in terms of its knowledge component and asserted that “investments in knowledge capital should be placed on the same footing as that of investments in plant and equipment” (p. 11). Investments in knowledge capital and other human capital aspects will not be on the same footing as tangible assets until their value is universally recognized by corporate and governmental organizations. Business literature describes the occurrence of a movement toward this paradigm shift in regard to the emphasis on human capital and the view that human capital is a source of organizational value (Barclay & Murray, 1997; Weatherly, 2003). However, it is acknowledged that there is little understanding of how to create and fully use this knowledge for the desired impact in practice (Wenger, 1998).

The majority of the knowledge management literature is focused on for-profit firms and how they are achieving a competitive advantage through their use of

knowledge management. This still leaves a question about the value that knowledge creates in the nonprofit organizations.

### *Nonprofit Organizations*

The importance and growth of nonprofit organizations as a sector in the world economy is increasing, as evidenced by their contribution to economic growth. Salamon, Haddock, Sokolowski, and Tice (2007) conducted a study with Canada, the United States, Japan, Belgium, New Zealand, Australia, France, and the Czech Republic. They found the nonprofit sector to be a major contributor to the country-specific Gross Domestic Product (GDP). As well, the sector experienced faster growth rates than their overall country GDPs. The average contribution by nonprofit organizations to their country's GDP was 5%, which was more than the utilities industry contribution at a rate of 2.4%, and almost as much as the construction and financial intermediary industries at 5.1% and 5.6%, respectively. The average annual rate of growth for nonprofit organizations was 8.1% versus the overall GDP average annual growth of 4.1% in the eight countries studied. In fact, in five of the countries, the nonprofit sector's growth exceeded that of the overall economy (Salamon et al.).

Because of this growth, and the rash of baby boomers anticipated to retire, it has been determined that the nonprofit sector will need 80,000 leaders by 2016. To address this shortage of leaders is an immense challenge for nonprofits, as it is difficult to attract executive leaders due to the lack of funding. Also, small human

resource infrastructures are not able to support the recruitment process (Tierney, 2000).

The following section addresses the literature on the nonprofit sector and its structure, stakeholder involvement, and mission focus. Additionally, literature is summarized surrounding the nonprofit sectors uniqueness as it relates to other economic sectors.

### *Organizational Focus*

Nonprofit organizations, being true to their namesake, are not focused on making a profit, in contrast to for-profit organizations in which profit is the major goal. The main tenet driving nonprofit organizations is a mission typically related to a specific service, constituency, or cause, and nonprofit organizations do not allow the financial bottom line to impact this concern (O'Neill & Young, 1988). Because of this lack of focus on profits, or the bottom line, nonprofit organizations rely on many "bottom lines," unlike their corporate counterparts' singular financial bottom line. Many bottom lines are necessary because no one way of measuring all the stakeholders' interests exists as there is with corporations' measurement of their shareholders: "A nonprofit organization has several bottom lines because no price mechanisms are in place that can aggregate the interests of clients, staff, volunteers, and other stakeholders that can match costs to profits, supply to demand, and goals to actual achievements" (Anheier, 2000, p. 6). Moreover, volunteers, paid staff, and professionals within nonprofit organizations are all unique

groups, having their own attributes and own knowledge; hence, they require different management strategies (O'Neill & Young, 1988).

### *Stakeholder Involvement*

Utilizing Martin's (2002) three-perspective theoretical approach, Fenton and Inglis (2007) examined a small nonprofit organization with regard to its organizational culture and core value alignment. The three perspectives viewed were those of the volunteers, staff, and board members of the organization. The findings of the study produced three implications: (a) the three-perspective framework is useful in reconciling the meaning of organizational values; (b) the board of directors and executive director both have vital roles in getting perspectives from all roles and levels in the organization before making decisions; and (c) leadership should "find techniques that capture the complexities of organizational life, which might be helpful to funding agencies" (p. 346).

Given the varying stakeholder objectives, management of nonprofit organizations is very complex. Sometimes, the organization has to function like multiple organizations in order to appease these stakeholders. Multiple bottom lines also lead to varying management styles taking place in the organization, as it may need to appear centralized when dealing with policy issues and decentralized when addressing differing client needs in local areas. Because of this model, nonprofit management should be creative instead of controlling (Anheier, 2000), and it can be argued that leadership activities are more vital to the nonprofit organization than any



other activity and “the ability of the nonprofit organization to provide services is related to the quality of its personnel” (Chung & Lo, 2007, p. 83).

From the perspectives of varying stakeholders, using a multi-constituency approach, Papadimitriou (2007) examined 20 Greek national sports organizations (NSO) to reveal effectiveness measures. In this approach, the perspectives of the core groups working for the organization – volunteers, paid staff, contracted professionals, and officials – are evaluated in addition to those of government, public policy makers, members, potential sponsors, board members, paid staff, and elite athletes. Findings indicated that NSO’s effectiveness and management were enhanced by incorporating the values and interests of multiple stakeholders; their views and contributions to the organization are essential.

Another strategic approach identified in the literature is the intellectual capital (IC) approach as a strategic tool in nonprofit organizations. The IC approach is considered appropriate as a means to find a common ground among differing interests. This approach could be useful within nonprofit organizations with their paid staff, volunteers, and other stakeholders to which they are accountable. The IC approach is non-competitive in nature, and encourages knowledge sharing with others in the knowledge economy as well (Kong, 2007).

### *Nonprofit Sector Uniqueness*

Many authors focus on the fact that there are major differences between nonprofit organizations and for-profit companies (Anheier, 2000; Brown & Yoshioka, 2003; Chung & Lo, 2007; Danesis & Zeiger, 2007; Gortner, Nichols, & Ball, 2007;

O'Neill & Young, 1988). Governmental organizations are also often addressed in those comparisons. But, due to the closer assimilation between nonprofit and for-profit organizations, with regard to the establishment of their existence without governmental policy, the majority of the literature focuses on the nonprofit and for-profit sectors. Some of the major differences with regard to the structure of nonprofit and for-profit organizations are summarized in Table 1 (Gortner et al., 2007).

Table 1. Nonprofit vs. For-profit Organizational Differences

Category	NONPROFIT	FOR-PROFIT
<b>Purpose</b>	Provide specific service to benefit stakeholders	Benefit consumers selling goods and services
<b>Societal Role</b>	Address unmet needs	Serve as economic engine
<b>Group Determining Purpose</b>	Organization officials and members	Owners
<b>Principal Funding</b>	Fundraising, member dues, grants	Revenue from sales of goods and services
<b>Group Ultimately Accountable to</b>	Donors and Board of Directors	Owners/shareholders
<b>Trust Expectation level</b>	High	Moderate

Gortner et al. (2007) found that, in addition to the structural differences between these two sectors, the manners in which these organizations operate are distinctly different. Empowerment differences exist between nonprofit and for-profit organizations in that nonprofit organizations are able to serve society in various ways and raise funds in a manner that for-profit organizations cannot. In addition, the tax-exempt status of nonprofits helps to sustain their existence. For-profit

organizations, however, are at an advantage in that they are neither constrained by what they engage in as a business nor by their operational structure. Nonprofit organizations are typically structured so that the departments are organized based on purpose, client base, geographic location, or program without focus on overall organizational goals. All resources, including management and communication mediums, focus on administering to each program's policy and goals. Gortner et al. noted that a negative aspect of the departmentalization they observed is that it "tends to create 'stovepipes' or 'silos' with regard to developing specialized knowledge at the expense of comprehensive understanding of or responsibility for the programmatic processes and service to which they contribute" (p. 121).

Some notable challenges exist with regard to employee learning and knowledge development in nonprofit organizations, as compared to for-profit organizations: (a) service-level training is more important in the nonprofit sector due to interaction amongst volunteers, external clients, employees, and the general public; (b) nonprofit organizations have fewer promotion opportunities within them so the focus is on expanding and enhancing existing positions with additional projects and committees; (c) a large number of nonprofit leaders are hired externally intimating that existing managerial skill gaps should be assessed and addressed from within, by the organization's own staff; (d) succession planning is not actively practiced at nonprofits as most leaders have longer tenures than those of their corporate counterparts; (e) the operational outlook within these organizations may become outdated and require external advice, opinions and examination of best practices in other nonprofits to update it; and (f) the learning impact often is greater

in nonprofits because of the immediate outcomes stemming from the direct contact with those whom they serve (Danesis & Zeiger, 2007).

Despite nonprofits having many differences from for-profit organizations, Danesis and Zeiger (2007) suggested that nonprofits could stand to focus more on financial measures. This approach could enhance this type of organization's purpose by making them more cognizant of financial outcomes. Other authors have noted that nonprofit organizations should, instead, use caution in adopting practices from other sectors because those practices may not be effective management tools in that they do not support the mission of the organization, nor are they particularly suited for the organization's operations (Anheier, 2000; Brown & Yoshioka, 2003; Danesis & Zeiger, 2007; Ostrower, 2007).

### *Mission Focus*

In addition to financial practices and other nonprofit areas of distinctiveness, some authors (Brown & Yoshioka, 2003; Danesis & Zeiger, 2007; Glasrud, 2001; Sawhill & Williamson, 2001) have contributed to the literature regarding the strategic use of organizational mission statements for nonprofits. Both nonprofits and for-profits use mission statements as a management tool; however, the mission takes on a greater importance in the nonprofit organization. In nonprofits, the mission is both externally and internally visible and is communicated to the public as the guiding purpose for the organization's existence.

In nonprofits, using the mission to synchronize employee and organizational values is vital because the values are what are incorporated into the employees'

actions, which help to solidify the organization's image being communicated to the public (Brown & Yoshioka, 2003). Glasrud (2001) discussed the role of the mission in guiding and motivating organizations toward future orientation and to tying the goals of various stakeholders together. Mission statements should be a tool in the strategic planning process, and should also be used to bring daily job activities and job functions toward a common focus that helps to strengthen the organization's overall mission achievement. Because of this mission attachment, the importance of training and employee development is emphasized to equip the organization's talent to help carry out the mission (Danesis & Zeiger, 2007).

Sawhill and Williamson (2001) focused on the importance of the mission in nonprofit organizations by examining a nature conservancy organization, as compared to 30 other nonprofits. The goal of the study was to establish a group of measures tied to performance in the areas of mission impact, conservation activity, and, capacity, as determined by fundraising, membership growth, and market share. Previously, the conservancy organization was measuring dollars of charitable donations and number of acres acquired for the conservancy, but it was not measuring performance tied to its mission of conserving biodiversity. The organization changed its performance measurement to focus on the organization's mission by measuring impact, activity, and capacity by focusing on biodiversity health, threat abatement, number of community-based offices opened, number of landscape-scale conservation plans developed, fundraising performance, membership growth, and market share. Sawhill and Williamson found that focusing

on the specific mission performance measurements was important in order to have all stakeholders aligned with the organizational goals.

The literature demonstrates that nonprofit organizations are unique as compared to other sectors and are of vital importance in their contributions to the world economy, through their mission focus and stakeholder involvement. Also apparent is that organizational practices, including knowledge management, need to be developed to capture and focus on this distinctiveness.

### *Tacit Knowledge Management*

Many studies have been completed in the area of tacit knowledge management. The major studies consist of reviews of organizational literature and international and domestic studies in nonprofit and for-profit organizations. Although some nonprofit tacit management studies have been done, the encompassing mission and stakeholder focus has not been explored in great detail. And, none of the existing studies have been conducted within a family and consumer sciences organization or a human services organization, defined here as an organization offering a broad range of services and facilities aimed at providing necessary human services and helping those who are least able to help themselves.

One previous study (Ipe, 2003) reviewed the literature of management theory, strategic management, information and decision sciences, organizational communication, and organizational behavior. Ipe focused on organizational knowledge at the individual level and developed a conceptual framework of the factors influencing knowledge sharing among individuals in organizations. This

conceptual framework includes the following: (a) nature of knowledge – explicit knowledge is more easily shared than tacit and differing values are attributed to each; (b) motivation to share – motivation is based on external (relationship to recipient and rewards given) and internal (perceived power) factors; (c) opportunities to share – formal opportunities (training programs, work teams, and technology models) and informal opportunities (communities of practice and involving informal networks); and (d) culture of work environment – influenced by cultures, subcultures, and attitudes toward knowledge sharing. Each of these four factors is interconnected and has influence over one another, with culture having the largest influence over the three other factors. Ipe also suggested the presence of further research opportunities in conducting in-depth investigations through case studies or ethnographies, as this work could be used to look at the nuances of the knowledge-sharing process within specific organizational settings.

In their review of tacit knowledge management literature spanning several decades, McAdam et al. (2007) concluded that tacit knowledge is an important aspect of organizational learning and posited that it should be used in organizations' practices. Based on their literature review, they contended that the focus should not be on converting tacit to explicit knowledge (as a lot of studies have done). Rather, the focus should be on how tacit knowledge is developed and incorporated into the organization, achieved by focusing on events and occurrences where tacit knowledge transfer can transpire: "There is not so much a need to operationalize tacit knowledge as there is to find new ways of talking, fresh forms of interacting, and novel ways of distinguishing and connecting" (p. 49). These authors also

submitted that there is a deficiency in the literature with regard to how tacit knowledge is applied within organizations regarding specific practices and overarching perspectives of the value of organizational tacit knowledge.

In addition, Liebowitz (1999) discussed the six key structural, cultural, and logistical elements he feels necessary for implementation of an effective organizational tacit knowledge management strategy: (a) a strategy for knowledge management with support from senior management; (b) a knowledge officer and knowledge management infrastructure; (c) knowledge ontologies and repositories; (d) knowledge management information systems, software, and tools; (e) incentives to encourage knowledge sharing; and (f) a supportive culture of both formal and informal knowledge sharing methods. Liebowitz's study was directed at knowledge management within corporations and identified exemplars of these knowledge management elements in practice at organizations including Dow Chemical, American Management Systems, the World Bank, Arthur Anderson, Price Waterhouse, Johnson & Johnson, and RWD.

Using the case study method to explore virtual team leadership in a for-profit New Zealand organization, Pauleen, Corbitt, and Yoong (2007) developed a model for uncovering and articulating knowledge by using action learning (uncovering) and grounded theory (articulating) in the process. This research captured relationship-building standards for virtual work teams within the organization. The authors noted that the existing knowledge management literature focuses on the structure, not the discovery and articulation, of tacit knowledge or the experiential aspects of knowledge. They also noted that Nonaka's (1994) SECI model is used by most



organizations as the starting point for knowledge management implementation. Furthermore, Pauleen, Corbitt, and Yoong asserted that their action learning and grounded theory model can have significance in the knowledge management process. One distinction of this model is that implementing and using it requires the expertise of a knowledge facilitator guiding the knowledge development.

A nonprofit organizational study (Teng & Hawamdeh, 2001) was conducted in Singapore with the National Library Board (NLB), consisting of 17 community libraries. Teng and Hawadeh defined the purpose of knowledge management as the following:

A complex process of aligning the company's mission statement with the best practices that enable the company to be competitive and profitable in its sector. This means finding out the most efficient, or most cost-effective, or most convenient way to get things done and then sharing that knowledge with others who can then apply it to the same or similar situations in the future. (p. 188)

Tacit knowledge management has traditionally been practiced in for-profit corporations but should apply to nonprofits as well, with the hope of improving organizational communications, work practices, and sharing behavior between employees, volunteers, or both. Corporate culture is fundamental to implementing tacit knowledge management practices in an organization, and measurement is necessary to see if the knowledge management practices are working. For instance, the NLB does not use a formal measurement system, such as knowledge auditing, knowledge mapping, or a scenario-planning tool, but can anecdotally tell

that it is working based on internal and external customer satisfaction indicators of low turnover rate, tenure, high morale with staff, returning customer rates, increased book loans, and positive feedback from customers (Teng & Hawamdeh, 2001).

The benefits, according to this study, of implementing tacit knowledge management practices are as follows: assisting with job recruiting; exposing people to complex problems to encourage further research and exploration of issues; helping professionals use problem-solving to approach issues quickly and efficiently; developing individuals' propensity to continually improve and grow; and overcoming disinclination toward sharing information, as it becomes part of the organizational culture. Moreover, Teng and Hawamdeh identified some of the improvements made to the NLB based on knowledge sharing practices as they relate to customer satisfaction and retention. They also gave examples of knowledge management tools within the NLB libraries: (a) conducting regular meetings with managers and directors of the 17 libraries to share information from each branch; (b) utilizing the "Info Xpress" database, which captures frequently asked questions from library patrons for re-use by library staff; (c) utilizing a Lotus Notes database at one branch; and (d) establishing a central programming unit overseeing meeting planning and related activities for all 17 libraries (Teng & Hawamdeh, 2001).

Another nonprofit case study of four Italian nonprofit organizations explored both explicit and tacit knowledge with interesting conclusions about the tacit knowledge in the organizations (Lettieri, Borga, & Savoldelli, 2004). In conducting their research, the authors focused on the cycle of knowledge management and utilized Quagli's (as cited in Lettieri et. al, 2001) four-cycle model, which

encompasses the generation and flow of knowledge through the individual, group, organization, and community levels. The study focused on the knowledge of volunteers, employees, and managers in the organizations and resulted in the authors' creation of a taxonomy of the specific types of knowledge in the four nonprofit organizations. The classifications include the following: accounting/administrative knowledge; managerial/organizational knowledge; teaching/training knowledge; fund raising/public relation/marketing knowledge; operational knowledge; and miscellaneous/non-characteristic knowledge. The miscellaneous/non-characteristic classification of knowledge is where the organizational tacit knowledge resides. Lettieri, Borga, and Savoldelli concluded that the organizations in this study did not value this type of knowledge nor were they aware of how to use it effectively. The authors recommended further exploration into strategies to codify and make explicit the tacit knowledge of these nonprofit organizations. They also noted that "rare efforts have been made to design and implement knowledge management systems for the NPOs, and fewer efforts still have been dedicated to research in this field" (Lettieri et. al, p. 19).

The tacit knowledge management studies summarized in this section of the literature review capture the essence of the literature surrounding how such studies have been approached. Additionally, the studies offer valuable insight into further research within a nonprofit organization that could strengthen this body of knowledge.

### *Summary*

The current literature on the topic of human capital and the value of tacit knowledge is limited to models of codifying tacit knowledge of employees within nonprofit and for profit organizations. To date, no other researchers have focused on volunteers and board members in nonprofit organizations nor on the relation of tacit knowledge management practices to organizational mission. Additionally, a need exists for studies involving the observation of the tacit knowledge transfer and management in a natural setting as there are no studies of this nature in human services or other family and consumer sciences organizations.

Many of the studies in this literature review point to the necessity for context-specific processes and models to contribute to this body of knowledge and further understand this growing need for tacit knowledge sharing and management. The case study of a family-oriented human services organization gives insight into the distinctiveness of a nonprofit organization in its valuing of tacit knowledge. Although the study results will be contextual in nature and may not lend themselves to being generalizable to other organizations, they hopefully will demonstrate the need for investigating knowledge management practices in other nonprofit and professional organizations with multiple stakeholders and mission attachment. The methodology and methods for the study are discussed in the following chapter.

### CHAPTER 3. METHODOLOGY AND METHODS

#### *Interpretive Paradigm*

This research was conducted through the lens of the interpretive paradigm, through which research is viewed as a way to better understand reality and the researcher within a given context (Koetting, 1984). Because of the contextual nature of interpretive research, it is imperative for the researcher to better understand a particular setting and activities that are specific to the organization. For that reason, appropriate ontological, epistemological, axiological, and rhetorical and methodological components were observed to achieve this understanding.

Ontologically speaking, for the interpretive paradigm, many realities occur naturally based on the researcher's interaction with the participants as well as researcher and participant experiences (Khazanchi & Munkvold, 2003; Ponterotto, 2005). The research subjects develop the interpretive researcher's reality, and the nature of the knowledge attained is conceptual with regard to the participants' meanings (Baranov, 2004; Berrell & MacPherson, 1995; Gephart, 1999). The epistemological component of this paradigm is that the researcher and study participants are completely dependent on one another because they work together to create knowledge throughout the study; therefore, objectivity is not a goal for this work (Khazanchi & Munkvold; Ponterotto). Instead, the researcher's biases are acknowledged as part of the axiology. The axiological component is that the researcher's and participants' values are integral to the research process and are incorporated into the study (Ponterotto). Lincoln and Guba (1985) defined *values* as

judges of preference or choice and include preferences grounded in assumptions, theories, perspectives, and social norms. From a rhetorical perspective, the narrative is personal, involved, and commonly written from the viewpoint of the researcher (Ponterotto) so the appropriate reporting structure needs to be consistent with this tenet.

I have not always been an interpretive researcher. Having an analytical and mathematical background, I was inclined to conduct analysis and generalize the results to other situations. It was midway through my doctoral program studies that I was drawn to the interpretive paradigm. Much of the research I conducted in my program focused on trying to understand various contexts and the participants within those contexts. I realized that in order to truly understand different people and situations it was important to develop the reality of the research collectively with the research participants.

#### *Methodology: Naturalistic Inquiry*

The methodological aspect I used within the interpretive paradigm is called naturalistic inquiry. Within this methodology, the data are obtained via the interaction between the researchers and the human participants, as well as from non-human sources of data. This type of research is a constantly evolving process because, as the interactions occur, new information is gleaned and additional information is sought (Lincoln & Guba, 1985).

The naturalistic form of inquiry has 14 characteristics that deeply informed this research design (Lincoln & Guba, 1985; Nastasi & Schensul, 2005):

(a) Natural setting – realities cannot be completely understood without studying them in their own setting. All parts of the study must be experienced together in order to form a complete understanding.

(b) Human instrument – the researcher and other human participants are the primary instruments by which data are gathered because any other non-human instrument would hinder the mutual shaping of reality and an instrument external to the study is not able to identify the biases inherent in the shaping of this reality.

(c) Utilization of tacit knowledge – in order to gain full appreciation of the researcher's own values, as well as the intuition and feelings surrounding the reality being experienced, tacit knowledge must be acknowledged and drawn upon during the study.

(d) Qualitative methods – these methods should primarily be used in naturalistic inquiry because they more easily depict the complexities of the various influences and values on what is being experienced.

(e) Purposive sampling – specific selection of the sample allows for fuller data collection within a unique, extreme, or critical case and allows for complete exploration of the research questions within that context.

(f) Inductive data analysis – allows for a greater focus on the multiple realities found and the interaction of various influences on these realities. Also, this form of analysis is conducive to the outward statement of values as the data are analyzed.

(g) Grounded theory – the guiding theory for the research is grounded in the data. Any other theory would not capture the multiple realities within the specific context of the research.

(h) Emergent design – the research design develops as the research progresses and as the researcher begins to experience the multiple realities and values that need to be explored in greater depth.

(i) Negotiated outcomes – the researcher's meanings and interpretations are verified with the human subjects of the research because the subjects are best at confirming their own realities, which is the ultimate purpose of the research (to capture these realities).

(j) Case study reporting mode – this form of reporting lends itself to capturing the multiple realities of the study as well as the researcher's biases. It also is beneficial for communicating thick description, which helps to fulfill the goal of transferability of the research's methodological components to other contexts.

(k) Idiographic interpretation – specific facts and events (data) are interpreted based on the context to establish the uniqueness of the phenomenon, rather than to create generalizations (as in a nomothetic approach that tries to find similarities and create laws to explain things in general).

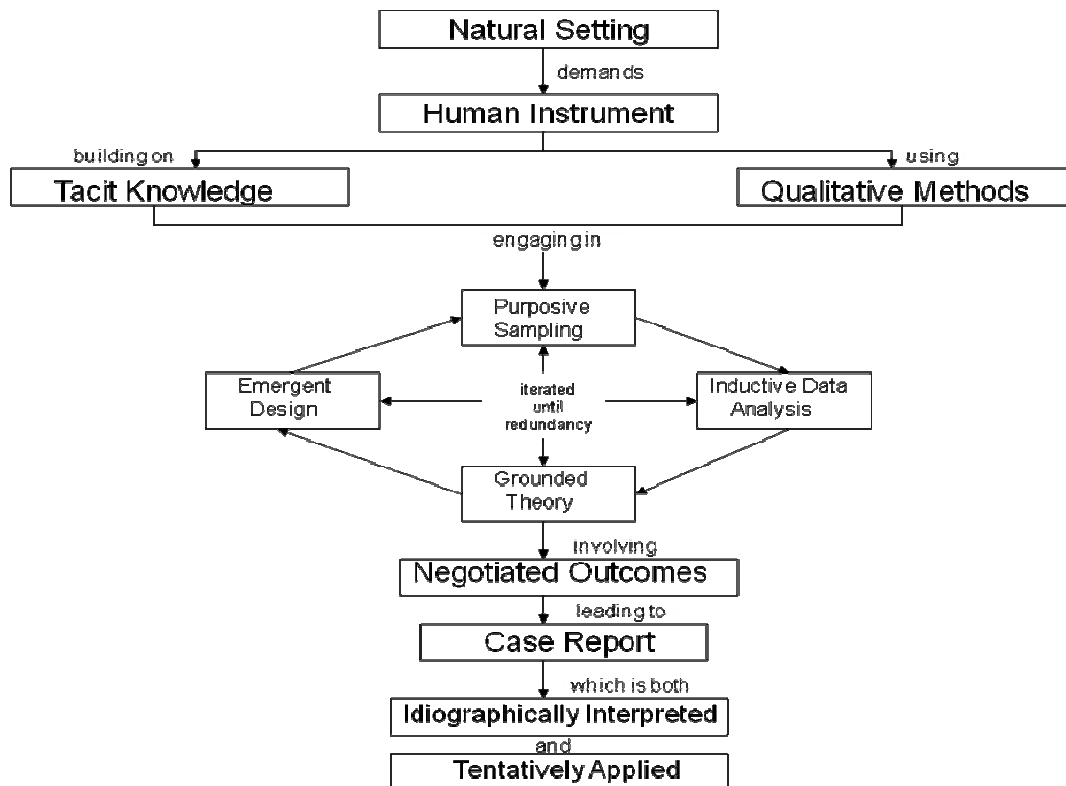
(l) Tentative application – due to the multiple and varying realities of the specific context, the researcher is prudent in not broadly advocating comprehensive application of the research findings because they may not be able to be duplicated elsewhere.

(m) Focus-determined boundaries – parameters of the research are established to allow the multiple realities to define the focus instead of limiting the research activities themselves. If the boundaries are established as to what is studied, the research is open to be explored within these confines.



(n) Special criteria for rigor – conventional rigor criteria (validity, reliability, and objectivity) are inappropriate for use with an emergent inquiry methodology such as this where the researcher is part of the inquiry, more than one reality is explored, and the results are not generalizable. Instead, trustworthiness criteria were used and are discussed in greater depth as they pertain to the research design for this type of research. Figure 2 illustrates the flow and interaction of these 14 characteristics during the inquiry process. Each of these criteria is addressed throughout the Methods section.

Figure 2. Flow of Naturalistic Inquiry



Source: Lincoln & Guba, 1985

## *Methods*

### *Purpose*

To reiterate, the purpose of the study was to explore how knowledge is managed within a large nonprofit human services organization and how this knowledge is valued within the organization. Knowledge was observed to classify it as tacit or explicit and to determine how the two forms of knowledge work in conjunction through the various organizational venues and activities promoting the generation and sharing of such knowledge towards mission accomplishment. The research questions addressed in the design of this study were as follows:

- (1) What knowledge cultivation and knowledge enabling processes exist within a nonprofit human services organization and how do these processes contribute to mission achievement?
- (2) To what extent does a nonprofit human services organization depend on a combination of explicit and/or tacit knowledge to achieve its mission?
- (3) What contributions do stakeholders (employees, board members, and volunteers) of a nonprofit human services organization make to the knowledge cultivation and knowledge enabling process in order to achieve the organizational mission?

I explored these research questions within a nonprofit human services organization using naturalistic inquiry methodology, an emergent research design, and the qualitative research methods of direct observation, document review, unstructured interviewing, and reflexive notes.

Prior to beginning the study, I received Institutional Review Board (IRB) approval from Iowa State University (see Appendix B). All research protocol consistent with the IRB procedures was followed, including submitting a recruitment e-mail to interview subjects, giving them the opportunity to opt out of the study, and providing the participants with informed consent documents to sign prior to commencing the research. For direct observation opportunities, I introduced myself to the person in charge of the meeting or training and asked that I be allowed to announce my presence prior to the start of the session. I indicated that I had the approval of the organization and that I was there to observe and take notes of interactions during the session. The next sections explain in greater detail the rationale chosen within each of the four methods comprising the research design.

### *Emergent Research Design*

The underlying theoretical framework that informed the research design process is Skyrme's (1997) work addressing the topic of knowledge cultivation, which focuses on the leadership role of organizations in nurturing knowledge as it contributes to creation and innovation. This concept is in contrast to knowledge management, which views knowledge as something to be controlled from a process standpoint. Knowledge cultivation is a key component of knowledge enablement, another concept informing the research. Cultivation is critical to knowledge enablement in an organization (vonKrogh, Ichijo & Nonaka, 2000). Knowledge enablement is the realization that the individuality of human knowledge is responsible for shaping the organization and its environment, and relies on the

development of tacit knowledge. Organizational knowledge enablement addresses the differences between knowledge and information, supports dynamic approaches to strategy development through collaborative communication channels, and allows for both the time and risk tolerance levels to achieve long-term knowledge sharing and development initiatives (Gelepithis & Parillon, 2002).

Additionally, this research supports the distinction of nonprofit organizations with their mission focus and stakeholder involvement, as opposed to organizations that are profit-focused and centered purely on employee management for the bottom-line of profit and growth and stockholder interests (Anheier, 2000; Brown & Yoshioka, 2003; Chung & Lo, 2007; Danesis & Zeiger, 2007; Glasrud, 2001; Gortner, Nichols, & Ball, 2007; O'Neill & Young, 1988; Sawhill & Williamson, 2001). Utilizing this foundation, I explored within the nonprofit human services organization how cultivating, enabling, and valuing the knowledge of its employees, volunteers, and board members enhances efforts to achieve its overall mission of helping children and families.

As recommended by Lincoln and Guba (1985) and Nastasi and Schensul (2005), I employed an emergent research design, meaning it developed as the research progressed and multiple realities were experienced. Although it is difficult to specify a research design for naturalistic studies until the study is actually undertaken and unfolds (Lincoln & Guba), studies can be preliminarily designed, by taking the following steps: (a) determine a focus for the inquiry (see research questions); (b) determine the fit of paradigm to the focus (see Interpretive Paradigm section); and (c) determine fit of the inquiry paradigm to the substantive theory

selected to guide the inquiry (see previous section). The following sections of this chapter address steps taken to (d) plan for trustworthiness; (e) determine where and from whom the data were collected, the sampling frames; (f) determine successive phases of the inquiry process, including the orientation and overview stage, the focused exploration stage, and the member check phase; (g) determine instrumentation, such as observation checklists and interview scripts (see multiple appendices); (h) plan data collection and recording modes; (i) plan data analysis procedures; and (j) plan the logistics for prior, during, following closure, and termination leading to the report writing phase.

The seven latter elements are now discussed in detail, starting with trustworthiness, the overarching quality control criterion for narrative research. Taking this approach means that some research design elements are necessarily introduced before they have been completely explained. I believe this organizational decision proves itself worthwhile. It brings clarity to issues of rigor prior to more detailed discussion of methods. As part of the design, and in preparation for the ensuing research, a research protocol was established to guide me in conducting the study (see Appendix C).

### *Trustworthiness Criteria*

Although validity is important to the positivistic research paradigm, the basis of this validity comes from the “trustworthiness of inferences drawn from data” (Eisenhart & Howe, 1992, p. 644). Operating in the interpretive research paradigm, it is important to assess the quality of the research by focusing one’s efforts on the

trustworthiness of the data (Eisenhart & Howe; Gephart, 1999; Graneheim & Lundman, 2004; Lincoln & Guba, 1985; Marshall, 1996). Trustworthiness is accomplished by ensuring the research outcomes have *truth value* based on the perspective of the research subjects in the setting. The research is important in determining to what extent the findings are applicable to other contexts or with other subjects, by ensuring consistency in results with subsequent studies conducted within a similar context with similar subjects, and by determining the degree to which the research results are driven by the subjects and conditions of the inquiry and not by the researcher's motivation, biases, and perspectives (Graneheim & Lundman; Lincoln & Guba). The evaluation of trustworthiness is a matter of judgment (Mishler, 1990), as trustworthiness is "less a matter of claiming to be right about a phenomenon than of having practiced good science" (Sandelowski, 1993, p. 2).

Trustworthiness includes credibility (instead of internal validity), transferability (instead of external validity), dependability (instead of reliability), and confirmability (instead of objectivity) (Bitsch, 2001). Various techniques were used in this research to achieve each aspect of trustworthiness in this research. These are each discussed in detail, vis-à-vis their place in this research design process.

### *Credibility*

Credibility speaks to the integrity of the research findings so that they resonate with those sharing the experience. The suggested strategies for dealing with credibility include prolonged engagement, persistent observation, triangulation, peer debriefing, negative case analysis, referential adequacy, and member checks

(Lincoln & Guba, 1985). All are discussed as they relate to their employment in the study.

*Prolonged Engagement.* Prolonged engagement is described as a way to add scope to the research through the investigator's involvement with a site long enough to build trust with participants, learn the culture, and be more attuned to misinformation (Davis, 1992; Lincoln & Guba, 1985). Credibility was achieved in this research by using a data collection period of approximately 12 weeks (81 hours). Additionally, three meetings were held with the organization's gatekeeper and other administrative personnel several months prior to commencing the research activity in order to develop rapport and a comfort level with my presence in the organization. "Gatekeeper" is defined here as one who provides access to key human, informational, and logistical resources needed to do research (Kitchin & Tate, 1999).

A data collection time frame of 81 hours allowed me to experience a variety of training courses, meetings, and participant interactions occurring in the organization. Of these 81 hours, approximately 16 hours were spent on site interviewing stakeholders, 46.5 hours were spent conducting observations, and 18.5 hours were spent gathering documents and other information and conversing with the gatekeeper and others about my research progress.

*Persistent Observation.* Whereas prolonged engagement adds breadth to a study, persistent observation adds depth through identification of those elements in the organization that accomplish the most detailed focus of the research (Davis, 1992; Lincoln & Guba, 1985). Persistent observation refers to the researcher working with participants, day in and day out, for a long period. The intent is to build

trust with participants, learn the culture, and check to ascertain whether there are any misunderstandings and misinformation. In this study, I combined pre-research visits and multiple direct observations during the data collection stage with member checking of the final report. I purposefully asserted myself into the culture of the organization, before, during, and after the research process. I became a familiar face at the organization sitting in the back of the rooms, walking to and from buildings for interviews, eating lunch in the cafeteria, and making myself visible. Many people would greet me as I walked by, ask how my research was progressing, or ask me specific questions about the dissertation process and the types of data collection I was using. Moreover, I had continual conversations with the gatekeeper, who was very interested in what I was learning and what additional data collection opportunities I needed. I became very comfortable with navigating my way around the research site and even gave directions to a lost visitor one day.

I relied on Dewalt and Dewalt's (2002) suggestions about direct observations that help the investigator: determine what is happening and why; sort out the regular from the irregular activities; look for variation to view the event in its entirety from a variety of viewpoints; look for the negative cases or exceptions; confirm when behaviors exemplify the theoretical purposes for the observation; seek similar opportunities for observation; and plan systematic observations of those events/behaviors. Over time, such events may change, so *persistent observation* of activities or events that one has already observed may be necessary. I accomplished this by observing similar content but with a variety of different stakeholders at different times.



*Triangulation.* Another form of naturalistic credibility, commonly used across multiple paradigms, is that of triangulation. Triangulation is defined as a way of achieving consensus in the research and “improving the probability that findings and interpretations will be found credible” (Lincon & Guba, 1985, p. 305). Freeman et al. (2007) explained that “using multiple researchers, multiple methods of data collection, and multiple theoretical analyses to complicate rather than simplify knowledge production also provide warrants for our claims” (p. 28). The greater the variety of ways a researcher can explore, substantiate, and analyze the research to produce a complicated accounting, the more certain he or she can be of its credibility. Denzin (1978) suggested four modes of triangulation, which relate to methods, sources, investigators, and theories (see below for more detail). Leech and Onwuegbuzie (2007) contended that a fifth form of triangulation, data analysis, should be considered to further strengthen a study’s credibility. Each is described in the following text vis-à-vis their role in this research design.

Methods are triangulated by utilizing different data collection techniques (Denzin, 1978; Lincoln & Guba, 1985). The data collection techniques used for the triangulation of methods included conducting interviews, making direct observations, and performing document reviews. Additionally, I kept a reflexive journal detailing decisions that I made during the data collection process and documenting my observations and reflections as to what I saw occurring with the research and my research decisions.

A source can be triangulated within and among each type of data source (Denzin, 1978; Lincoln & Guba, 1985). Within the interviews, triangulation occurred

by utilizing a variety of interview participants from various stakeholder groups, employment tenures, and parts of the organization. Document triangulation occurred by examining a variety of document sources and types and by verifying the credibility of the documents against each other. Direct observation triangulations occurred by viewing a variety of training courses, meetings, and other gatherings and by sometimes viewing multiple occurrences within each of these types of observational opportunities.

Triangulation among the sources themselves was performed to verify the same information across source types (Denzin, 1978; Lincoln & Guba, 1985). Primary and secondary data sources in this research consisted of interview transcripts, documents, direct observation field experience logs, and reflective notes in the reflexive journal, all of which were used to triangulate the same information raised in one or more of the data sources.

Investigator triangulation is accomplished by utilizing a team of investigators involved in constant communication to take part in similar data collection (Lincoln & Guba, 1985). As this research is my doctoral dissertation requiring individual work, this form of triangulation was not feasible for this study.

Triangulating theories involves corroborating facts with two or more theories that inform the research. This form of triangulation is not consistent with the naturalistic form of inquiry employed in this research design because the substantiation of theories is nothing more than finding similarity between one or more theories, which is not the intent of this research. To an extent, Skyrme's (1997) theory informed the generation of the research design, but this is different than

corroboration of findings with theories. The latter can be the goal of the literature review and was to some extent in this study. Because triangulating theories does nothing to add to the underlying credibility (integrity) of the research findings generated in this study, it was not a part of the research design. In conclusion, method and source triangulation were employed in this research design, but investigator and theory triangulation were not.

To continue on a more general note, data analysis triangulation is considered one of the most important steps in the research process. It allows the researcher to look at the same data in different ways, potentially gaining additional insight from the various forms of analysis (Leech & Onwuegbuzie, 2007). I utilized an analytic strategy to achieve this goal for each of the data types, discussed further in the data analysis section of this paper. My reflexive journal was an additional source of data, although not coded itself, to ensure that appropriate codes and categories were developed as a result of the analysis of other data sources. It was additionally beneficial to use this reflexive journal to make notes of themes I saw emerging before, during, or sometimes a few days after a data collection event had taken place.

*Peer Debriefing.* The technique of peer debriefing also was used to establish credibility. I conferred with two different colleagues, both disinterested parties to this research, on a weekly basis to assist me with (a) maintaining consistency as to my role in the research, (b) developing steps in the emerging design of the study, and (c) organizing research ideas and themes as they were occurring (Lincoln & Guba, 1985). As my research employed an emergent design, this technique was very

useful in talking through how various pieces of data collection would be classified and what additional data collection opportunities were desired. I have assisted these colleagues with similar activities during previous research projects, and we have similar paradigmatic orientations, allowing for insightful use of this technique.

*Negative Case Analysis.* Another credibility strategy recommended by Lincoln and Guba (1985) is negative case analysis, which involves continuous enhancement of research conclusions in order to account for all cases related to the study at hand. Working interpretations of the data or cases were developed and as new cases within the study site contradicted these interpretations, the interpretations were updated to account for the new cases. When new cases are consistent with the working interpretations, the new cases increase the credibility of the design (Williams, 2006). The research outliers, or negative cases, were welcomed as part of the study, contributing to the study's rich description (Lincoln & Guba). Negative case analysis was used during the constant comparative data analysis phase to ensure that an accurate portrayal of the organization occurred, which is explained in the data analysis section (Agostinho, 2004).

*Referential Adequacy.* This technique is used to measure the adequacy of the data collected and is done by comparing archived material, either in electronic or textual format, with other data. It involves identifying a portion of data to be archived, but not analyzed. The researcher then conducts the analysis of the remaining data and develops preliminary findings. The researcher then returns to this archived data and analyzes it as a way to test the credibility of the findings. There is discussion surrounding the utility of such a technique for naturalists because the strategy

diminishes the usefulness of some of the initial findings for nothing other than a comparison tool (Lincoln & Guba, 1985). I did not employ the criterion of referential adequacy in this research design.

*Member Checking.* The final technique used for establishing credibility in the research is member checking. According to Lincoln and Guba (1985), this technique is the most critical to establishing credibility. Member checking was accomplished in my research design by submitting transcripts of the interviews to the interviewees to verify the accuracy of their accounts. The interviewees submitted corrections or clarifications to their transcripts and any significant changes were discussed as to whether or not it was a clarification change or a content change so that I did not lose the flow of the original interview. Leaders in the organization were asked to verify the document analysis and observation findings as to the researcher's accounts of what knowledge is flowing through the organization. Additionally, a comprehensive member check was performed where a draft of the case was tested for factual and interpretive accuracy (Lincoln & Guba). As will be discussed in the section on writing the report, the case draft was presented to the gatekeeper in order to verify the factual accuracy of the report.

### *Transferability*

Another trustworthiness criterion is transferability. It refers to the degree to which the research can be used by others to draw from and implement components of the research such as design, methods, and analysis, if applicable. In order to allow the reader to determine this applicability, thick, rich descriptions were used as

they related to the observations, interviews, document analysis, and personal reflections. This process ensured the accuracy of the database, thereby providing the means for others to find appropriate parallels between this study and other studies. Utilizing a comprehensive database to construct a thorough, accurate accounting of the research allows for extraction of the data framework to use in other studies (Lincoln & Guba, 1985). I used *Atlas.ti* software for the storage and management of the data in this study. The software and data management process are discussed in greater detail in the data analysis section.

### *Dependability*

Dependability is a trustworthiness ideal and refers to how well the results hold up over time with similar participants in a similar context. It is required in order for credibility to exist in the research (Bitsch, 2001; Lincoln & Guba, 1985). So, if credibility is demonstrated, especially through the triangulation techniques previously discussed, dependability should be as well (Lincoln & Guba). One technique that ensures dependability is the provision of a very thorough description of the research method (Krefting, 1991) that (a) accurately and comprehensively details any specific adjustments to methods and techniques as dictated by the emergent nature of the research (Bistch) and (b) is informed by the reflexive journal entries. This strategy is known as *standards of evidence* and includes documenting all procedures as completely and systematically as possible (Freeman et al., 2007; Lincoln, 2002). This documentation was accomplished by detailing the description of decisions and

methods, showing the relationship between the data and research claims, and considering the strengths and shortcomings of the study.

The description of design and methods shows the decisions, procedures, and thinking involved so that readers know the process that led up to the research findings. The data and research claims relationship is demonstrated by giving examples from the interview transcripts including direct quotes and making as much of the original data available, while not compromising the anonymity of the research participants or organization. The strengths and shortcomings of the research will be addressed in Chapter 6 in terms of other ethical issues and the organization's anonymity desires (Freeman et al.).

### *Confirmability*

The final component of trustworthiness, confirmability, is concerned with the neutrality of the researcher's accounting of the research (Lincoln & Guba, 1985). The research process must be documented in great detail by compiling an audit trail (Bitsch, 2001) that consists of the following items: (a) raw data, including audio tapes, documents, records, and field notes; (b) data reduction and analysis products, including condensed field notes, concepts, interview summaries, and feelings about specific observations and site visits; (c) data reconstruction and synthesis products, including how various categories of the data are established into themes and relationships, conclusions, final reporting notes, and literature review connections; (d) process notes, including those for the rationale behind procedures, design, and strategy, and documentation of adherence to all forms of trustworthiness in the

research; (e) research purpose documentation including the research proposal, reflective notes, and research expectations; and (f) instrument development information, such as preliminary observational schedules, site visit schedules, interview questions, observation formats, and checklists (Halpern, 1983).

Some conventional scholars suggest that the purpose of the audit trail is for an external auditor's use in evaluating the research to identify the quality of the research as well as contribute to the credibility and overall trustworthiness of study (Lincoln & Guba, 1985; Miller & Creswell, 2000). However, I chose to follow more contemporary views of the audit trail and questioned the need for an external auditor because using an external auditor may not significantly contribute to the credibility of a study as was once thought. The role of the external auditor is to judge the research, assess researcher biases, and determine if the findings are consistent with the data collected. This line of thinking is consistent with the positivist influence as to what constitutes rigor. But, in interpretive research, there are naturally biases in the research, and the chain of reasoning of the auditor and the researcher most likely differ, although both can have merit (Cutcliffe & McKenna, 2004; Garner, 1991). Additionally, the responsibility of ensuring rigor in the research should be placed on the researcher and not on an external evaluator, as a positive evaluation does not necessitate a rigorous study (Morse, Barrett, Mayan, Olson, & Spiers, 2002, p. 8).

The value of the audit trail is that it allows other researchers to see the codes and categories used for the analysis of the data. It also allows insight into the reasoning behind why the data are placed into various codes and categories as well



as the method of grouping these to answer the overarching research questions guiding the study. The audit trail in this research allows others to check the thinking behind my work. I thoroughly explain my choices within each of the data collection sources, such as which types of direct observation opportunities I chose, what types of stakeholders I interviewed and why they were chosen, and what documents were selected. Respecting an emergent research design, I made notes as to how codes and categories were assigned, how I arrived at their selection, and any difficulties that were encountered in the process (Hewitt-Taylor, 2001).

### *Sampling*

Any sampling procedures in interpretive research should give the researcher flexibility and depth in exploring the research topic (Padgett, 1998). The *topic* of this study is knowledge management, especially tacit knowledge, within nonprofit, human services organizations. Three research questions guide this study, all of which are engaged with giving a voice to mission-focused organizations that are responsible to stakeholders as opposed to profit-focused organizations responsible to shareholders. Employees, volunteers, and board members of nonprofit organizations also are a focus of this research because they are considered key organizational stakeholders whose collective importance in organizational tacit knowledge cultivation vis-à-vis mission achievement has been given little recognition in the literature. To that end, this section discusses sampling theory for choosing the main unit of analysis (the non-profit organization) as well as the selection of

participants to interview within the organization, which activities to observe, and which documents to collect, in that order.

### *Organization Purposive Sampling*

The first decision that must be made with regard to sampling is that of the main analytic unit. The knowledge management and cultivation literature focused primarily on for-profit organizations, but there was a large gap in research with a focus on the non-profit sector. To that end, purposive sampling was used to select the specific nonprofit human services organization for this research study. Purposive sampling is the preferred method of sampling with narrative, and especially qualitative, research methods, because purposive sampling complements the depth and breadth of information found in this type of research (Lincoln & Guba, 1985; Nastasi & Sechensul, 2005; Patton, 2002). Purposive sampling is oriented toward developing knowledge and findings from studying individual cases or events (Sandelowski, 2000). Purposive sampling does not produce a sample that is representative of a larger population, but it can be exactly what is needed in some cases – the study of an organization, community, or some other clearly defined and relatively limited group. The researcher handpicks subjects to participate in the study based on identified variables under consideration (in this case, large non-profit human services organizations), and this form of sampling enables the researcher to study the lived experiences of a specific population. The intent is not to produce a representation of a larger population but to develop an information-rich case for in-

depth analysis related to the central topic being studied (knowledge management, cultivation, and enablement in the non-profit sector) (Patton, 2002).

The *specific purpose* for the sampling in this particular research design is *critical case sampling*. The critical case allows the application of the findings from one study to other cases with the notion that if the information is applicable to this case, it could be true of other cases as well (Patton, 2002). The size and diversity of the nonprofit human services organization under study here lends itself to being considered a critical case. It has a large endowment, number of employees, volunteers, and board members and, additionally, has diversity in its service offerings. Exploring knowledge cultivation and knowledge enabling practices within such an organization would contribute to the achievement of a robust accounting of nonprofit human services organizational knowledge cultivation practices and would allow smaller nonprofit human services organizations insight into examining their own practices, where the variety and number of stakeholders may not be as prevalent. Sampling techniques consistent with interpretive research must be flexible in order to ensure effective representation and allow for saturation with enough information about particular topics (Padgett, 1998). The initial sampling approach within this organization is now discussed as it relates to each form of data collection.

#### *Unstructured Interview Participant Sampling*

Employees, volunteers, and board members of non-profit human services organizations are considered key organizational stakeholders; yet, they have been

given little recognition in the literature collectively as to their importance in organizational knowledge cultivation and mission achievement. To address this gap, this study solicits their voices via unstructured interviews. At the beginning of the research design process, a key informant (gatekeeper) at the organization was identified (Kitchin & Tate, 1999). The gatekeeper was interviewed and this person also nominated other interviewees as the research emerged. As well, subsequent interviews with gatekeeper-recommended and researcher-identified interviewees within the three stakeholder groups were arranged to fill in gaps of information, to contribute contrasting information, or both. The sampling of the individual units was continually adjusted based on what emerged as the most relevant data during the study. As interviewees were identified, they were contacted prior to their involvement in the study via a recruitment e-mail (see Appendix G) at which time they were sent a copy of the Informed Consent document (see Appendix H). The signed Informed Consent document was collected during the interview. The selection of additional interviewees progressed to the point when saturation had occurred, defined as the point when no new information or themes were observed, when redundancy had been reached, and when similar information arose from subsequent interviewees (Lincoln & Guba, 1985). Very recent research confirms that saturation occurs within the first twelve interviews, and high-level thematic development is thought to occur with as few as six interviews (Guest, Bunce, & Johnson, 2006).

The gatekeeper provided me with a list of 20 potential employee and volunteer interviewees to contact, and the gatekeeper sent an introductory e-mail to

all 20 people on the list indicating that I might be contacting them and provided them with assurances that I had the support of the organization. I used this list and selected five initial interviewees, including the gatekeeper. Among these five there were combinations of part-time and full-time employees, management and lower level employees, as well as those working directly with children and families and those in more administrative roles. Various tenures in the organization were also represented ranging from two to thirty years. Four of the five employees responded to my request for an interview.

My intent was that I would request access to volunteers and other employees from these interviewees. My first four interviews consisted of the gatekeeper, two management-level employees, and one part-time hourly employee. Going back to the original list of 20 provided by the gatekeeper, I e-mailed my fifth interviewee who was another administrative employee. After this interview, I realized the need to begin interviewing volunteers and board members to enrich my data collection process. I contacted the gatekeeper, who put me in touch with supervisors employing volunteers in their respective areas. I then proceeded to notify the gatekeeper, who sent an introductory e-mail, and I interviewed three volunteers from different areas of the organization. It was very important to keep the gatekeeper apprised of further data collection needs so that he/she was able to provide an introduction for me, help coordinate logistical aspects, and also to keep him/her updated as to what I was doing in the organization and in my research.

I found that during some of the interviews, information about other stakeholder groups were discussed, allowing me to gain second-hand perspectives

from other stakeholders as well. For example, during one employee interview, the volunteers in the organization were discussed, as this particular employee has direct contact and interaction with volunteers. The same thing occurred with employees discussing board members and volunteers discussing board members.

Because the board of trustees of the organization is small in number and geographically dispersed, their schedules precluded me from interviewing them in person. So, I was limited to interviewing an executive-level employee who has direct dealings with the board members and is in attendance at their meetings. As I was unable to obtain access to the board members themselves due to their geographically dispersed locations and personal schedules during the time of my data collection, I interviewed an employee who served as a proxy respondent for the board members. A proxy respondent is defined as “an individual who is considered to be a suitable substitute when an individual who was originally selected cannot or should not, for one reason or another, participate” (McClelland, 1995, p. 127). I determined that the employee I interviewed was an appropriate substitute as he/she is an executive who attends all of the board meetings, corresponds daily with board members, is integrally involved in the selection process of board members, observes knowledge sharing of the board members, and is responsible for the development of the knowledge documents they use.

### *Direct Observation Sampling*

Training, courses, meetings, and other observational opportunities were used for purposes of direct observation (and persistent observation to better ensure

credibility). Direct observations allow the observer to view what participants actually do in context, they allow the investigator to focus attention on specific areas of interest, and they capture data that would otherwise have gone unrecorded or unnoticed. The same sampling process used for the unstructured interview participants were used for the selection of training courses and meetings to study, in that the gatekeeper recommended initial observation venues and other venues followed to fill in the gaps or be an opportunity for contrasting information. Although not specific to group observations, it is suggested that group discussion sample sizes of more than 12 to 14 is the point where it becomes difficult to achieve the depth required for interpretive research (Ritchie, Lewis, & Elam, 2003). For the majority of my observations, I chose groups with less than fifty people to be able to effectively focus on the various participants involved.

Observations can be obtrusive and participants may alter their behavior due to the presence of an observer. It is recognized that with this method, the effect of the researcher can never be “controlled” but data triangulation can balance the usefulness of the human interaction data with the expected researcher bias (Lincoln & Guba, 1985). On a related theme, although the IRB determined that informed consent was not necessary for this sampling method, I did obtain cooperation from the participants via the gatekeeper. The gatekeeper made them aware of the reason for the study and gave them an opportunity to opt out and take the training at a later time.

The gatekeeper and I initially decided on three direct observation opportunities: a management meeting, a department meeting for the gatekeeper's

department, and a five-day pre-service employee orientation. With the latter, I treated each day as a separate observation as there were different presenters every day, different settings, and different groupings of the trainees that I observed. In addition to my initial planned observations, reference was made to a museum at the organization during one of the interviews, so I included a tour and observation of the museum as one of my observations. Other conversations came up during or immediately after the observation sessions, but I did not count these as interviews because I was not asking questions the way that I would during interviews. They were more informational conversations with people voluntarily sharing information with me as I was obtaining documents or even waiting in between meetings. Initially, starting off, I focused on the employee stakeholder group because they had the largest representation proportionately in the organization. As I reached saturation with regard to employee observations, I focused more on the volunteer observations. Board member observations were not possible, but I feel as though I was able to get a sense of this stakeholder group through observations with the proxy and through an abundant number of documents that I was able to analyze, including meeting minutes.

### *Document Sampling*

The sampling of organizational documents was also an emergent process, and I looked for a sampling of documents related to the company mission and the work of the various stakeholder groups. The sampling frame was developed by using (a) the gatekeeper as the initial source of available documents and (b)



complementary documents to vet with other forms of data collection, such as handouts from meetings and references to documents made during interviews (Ritchie, Lewis, & Elam, 2003). Although explicit information as to the number of document samples was not found in relation to naturalistic inquiry, Morse (1994) suggested 30 to 50 data sources in ethnographic or grounded theory research. I collected 34 documents as a complement to the other forms of data collection in this research.

Documents can be classified by (a) their status as records that provide an accounting of an event, such as meeting minutes and legal filings, and (b) by any other form of documentation that already exists about the research context, such as case studies, photographs, and speeches. The records and context-specific documents were obtained for different purposes. The record documents were sought as evidence of particular events occurring during or prior to the study that could inform the research. The context-specific documents could be obtained to enhance the research as well but were not sought out in relation to a particular event (Lincoln & Guba, 1985). Documents can further be classified by primary and secondary source documents, with primary documents referring to firsthand accountings of events, and secondary documents being obtained from other sources (Guba & Lincoln, 1981). Both types of documents were used in this research. Stakeholders in the organization were most likely to author the primary documents, while secondary documents were external accountings of organizational occurrences reported in press clippings and articles about the organization.

Although it is noted, with regard to document sampling, that the “naturalistic inquirer will rarely enjoy the luxury of an a priori taxonomy” (Lincoln & Guba, 1985, p. 278), I attempted to break down the categorization of documents for examination by record documents and context-specific documents. Within each of these categories, I further classified them by primary or secondary documents, and I used my document review guide (see Appendix F) to initially request documents for review. I reviewed newsletters, meeting minutes, bylaws, reports, and agendas, as well as newspaper articles, in order to achieve representation from all stakeholder groups. Additionally, I secured organizational documents and external reports on this organization to support my findings or allow further insights into a specific theme (Creswell, 2003; Rossman & Rallis, 1998). I created a table of the types of the collected documents organized by (a) primary or secondary, (b) record or context-specific, and (c) the type of stakeholder or stakeholders to which they pertained (Table 2) (Spitler, 2002).

Table 2. Document Collection Type

<b>Document Description</b>	<b>Primary/ Secondary</b>	<b>Record/ Context-Specific</b>	<b>Stakeholder(s) relatedness</b>
<b>Training Mission/Values Chart</b>	Primary	Context-specific	Employee
<b>Mission Refocus handout</b>	Primary	Context-specific	Employee
<b>Organizational Newsletter</b>	Primary	Context-specific	Employee/Volunteer/Board
<b>Daily Notes</b>	Primary	Context-specific	Employee/Volunteer
<b>Training Program Overview</b>	Primary	Context-specific	Employee
<b>Data Newsletter</b>	Primary	Context-specific	Employee/Volunteer/Board
<b>Training Department Newsletter</b>	Primary	Context-specific	Employee
<b>Cibola County Article</b>	Primary	Record	Employee/Volunteer/Board
<b>Highlights from History</b>	Primary	Context-specific	Board
<b>Board Member Pocket Card</b>	Primary	Context-specific	Board
<b>Site Report</b>	Primary	Context-specific	Employee/Volunteer/Board
<b>Dual Care Report</b>	Primary	Context-specific	Board
<b>Annual Report</b>	Primary	Record	Employee/Volunteer/Board
<b>Forward Magazine Article</b>	Secondary	Context-specific	Employee/Volunteer/Board
<b>Omaha World Herald Article</b>	Secondary	Record	Employee/Volunteer/Board
<b>Washington Post Article</b>	Secondary	Record	Employee/Volunteer/Board
<b>Chicago Sun Times article</b>	Secondary	Record	Employee/Volunteer/Board
<b>Executive Director video</b>	Primary	Context-specific	Employee
<b>Branding Video</b>	Primary	Context-specific	Employee
<b>Training Leader Podcast</b>	Primary	Context-specific	Employee
<b>Career Path Video</b>	Primary	Context-specific	Employee
<b>Movie/Documentary</b>	Secondary	Record	Employee/Volunteer/Board
<b>Board Orientation Policy</b>	Primary	Context-specific	Board
<b>Volunteer Letter</b>	Primary	Context-specific	Volunteer
<b>Volunteer Handbook</b>	Primary	Context-specific	Volunteer
<b>Orientation Packet</b>	Primary	Context-specific	Volunteer
<b>Business Forecasting Process</b>	Primary	Context-specific	Employee
<b>Organizational Goals</b>	Primary	Context-specific	Employee/Board
<b>Board Responsibilities Policy</b>	Primary	Context-specific	Board
<b>Board Self-Assessment</b>	Primary	Context-specific	Board
<b>Board Meeting Minutes</b>	Primary	Record	Board
<b>Bylaws</b>	Primary	Record	Board
<b>History of Structure</b>	Primary	Record	Board
<b>Strategic Direction</b>	Primary	Context-specific	Board

These documents in their entirety were obtained in electronic format or scanned into a rich text format file in order to import them into the Atlas.ti software (to be discussed later) for analytical purposes. Any hard copies of confidential documents were returned to the organization upon scanning them.

The first documents I obtained were from interviewees or meeting and training leaders. If the interviewee referred to a particular document during the interview, I requested a copy of it at the end of the interview. If handouts, training manuals, or books were distributed during my observation sessions, I secured a copy. During the board member contact interview, I asked if I would be able to analyze board meeting training materials and meeting minutes. This request was approved, and I came back to the organization following a board meeting to review these documents.

Additionally, I picked up periodicals and newsletters produced by the organization as I was leaving the site. I also did a ProQuest literature search for externally prepared articles and record documents on the organization. Overall, I tried to get a good combination of the documents used by board members, volunteers, and employees as they shared their knowledge and learning about the organization. Many of the documents pertained to all three stakeholder groups because they were either specifically referenced by several members of each stakeholder group or were externally published and accessible by the stakeholders.

As this was an emergent research design, much of the data collection occurred in conjunction with other visits. Some of the discussions occurred as I was leaving my interview appointment when the interviewee or others in the organization

would share information with me. During one particular site visit, I was picking up materials that the board members used and the employee providing me with these materials shared with me his interactions with the board members and went through each document and how the Board members use them. During another site visit for the purpose of a meeting observation, without my asking, an employee talked to me for thirty minutes about the organization and what he did to contribute to the mission. Table 3 illustrates the composition of the data sources collected and the stakeholder groups represented within each source type. Some direct observations and documents were not exclusive to one stakeholder group, so the number related to employees, volunteers, and board members does not equal the “total collected” for these two data sources.

Table 3. Data Source Composition

Data Source	Number Related to Employees	Number Related to Volunteers	Number Related to Board Members	Total Collected
<b>Unstructured Interviews</b>	5	3	1	9
<b>Direct Observations</b>	9	3	3	12
<b>Documents</b>	21	14	21	34
<b>Reflexive Journal</b>	N/A	N/A	N/A	N/A

### *Data Collection*

Once the sample frames were established, data needed to be collected from them. As noted, I used four particular sources of evidence, including unstructured

interviews, direct observations, documents, and reflexive notes – a common research design strategy for narrative research (Goldstein & Reiboldt, 2004). As a caveat, Freeze and Kulkarni's (2007) knowledge asset classifications guided my organization of the tacit and explicit data, and included the following five categories: expertise, knowledge documents, lessons learned, policies and procedures, and data. Each is described below.

The classification of *expertise* is highly tacit and includes processes and strategies aimed at utilizing (a) experts in core areas; (b) expert contacts, one-on-one, and group collaboration opportunities; and (c) mentoring relationships. *Lessons learned* are also a form of tacit knowledge and consist of knowledge gained while undertaking a task or project, and they constitute internal benchmarking for the best way to accomplish tasks and projects. *Knowledge documents* represent fully explicit knowledge of the organization in the sense that they are external and in the form of text or other media such as pictures, drawings, diagrams, presentations, audio, and video. *Data* include explicit knowledge such as facts and figures from research and experimentation with processes and activities, while *policies and procedures* refer to the institutional knowledge required for an organization to maintain consistency in routine operations. Policies and procedures often arise from the lessons learned and expertise components, can be rooted in the minds of individuals, and in the organizational rules, routines, cultures, structures, and technologies (Argote, McEvily & Reagans, 2003). With these classifications in mind, the unstructured interview is the first data collection method discussed.

### *Data Collection in Form of Unstructured Interviews*

One purpose of using unstructured interviews in narrative research is to obtain current accountings of people, events, activities, organizations, feelings, motivations, claims, concerns, and other entities (Lincoln & Guba, 1985), which is the goal of this research. The unstructured interview is the preferred type of interview for the naturalistic inquiry because it “is the mode of choice when the interviewer does not know what he or she doesn’t know and must therefore rely on the respondent to tell him or her” (Lincoln & Guba, 1985, p. 269). In an unstructured interview, the interviewer does not look for standard responses; rather, she looks for the interviewees’ reactions and thoughts on broad issues (Guba & Lincoln, 1981). So, question posing is adjusted according to how the interview progresses, and respondents are encouraged to talk openly about issues rather than answer many specific questions.

Knowledge cultivation and mission questions were my initial open-ended questions, and then I asked follow-on questions using Freeze and Kulkarni’s (2007) organizational knowledge framework as a basis for questions regarding types of knowledge (see Appendix D for preliminary questions that I used to guide the interview and conversation, with many predicated with the phrase, “Please share a story about...”). This approach respects the tenet that participants should see themselves as having influence and selfhood rather than simply “respondents” answering predetermined questions. Interviewees should be facilitated to tell their story their own way with gentle guidance to keep the narrative going and on task with the research questions. The intent is to find meanings, to acquire deep

knowledge, and reveal the authenticity of the person's life experiences (Gubrium & Holstein, 2001).

Moreover, Lincoln and Guba's (1985) four components of conducting interviews were respected. I (a) prepared for the interview in terms of level of dress, formality, and confirming the interview time and location; (b) asked initial questions to allow the interviewee to warm to the interviewer and prepare him or her for the ensuing questions; (c) paced the interview and allowed the interviewee to do the majority of talking and prompted for more responses when necessary; and (d) concluded the interview when the interviewer and interviewee exhibited signs of fatigue and recapped what was said by the interviewee as a form of early member checking.

I conducted nine unstructured interviews within the organization (per Guest, Bunce, & Johnson, 2006). Using various job classes and tenures of employees across the organization's different divisions and service areas, I conducted all interviews onsite, with the exception of one where I interviewed the person at her full-time place of employment. During the interviews, I used a section of my research notebook to take notes about general observations of the interviewee, interview content, and the context, and the interviews were recorded using a tape recorder and were transcribed by a third party (see section on thematic analysis for more information on this aspect of the protocol). The transcriptions were shared with the interviewees for purposes of member checking, as addressed previously. Following the tenets of the constant comparative analysis method, I analyzed the interview data as soon as I began conducting interviews, comparing the results in a



recursive manner. This approach helped me determine if I had reached saturation (Hewitt-Taylor, 2001). I continued to conduct interviews until I reached data redundancy and determined that no new information could be derived from subsequent interviews and no new codes were emerging or necessary.

Confidentiality of the interview participants was maintained by giving each participant a pseudonym prior to the start of the interview and using this pseudonym in all recorded, transcribed, and written references to the interview participant. The code linking the person's real name to his or her pseudonym was maintained by me on the password protected hard drive of my computer residing in my locked residence. The list will be destroyed after a period of five years.

#### *Data Collection in Form of Direct Observations*

The next method of data collection was direct observation. Direct observation is used in naturalistic inquiry to achieve a level of depth in the research setting. It also allows the researcher to view the site through the eyes of the participants by using his or her tacit knowledge, in addition to the tacit knowledge of those being observed, in formulating his or her perceptions of the organizational culture (Guba & Lincoln, 1981; Lincoln & Guba, 1985). I conducted 12 direct observations during the course of the study, as 12 to 14 direct observations have been determined to achieve saturation (Ritchie, Lewis, & Elam, 2003). The overt form of observation was preferred because it allowed me to experience things occurring naturally (as opposed to a covert form of observation). Observations can be recorded in much the same way that the interviews are, with regard to using electronic media.

Additionally, they can be recorded using other naturalistic techniques, such as running notes, field experience logs or diaries, notes on thematic units, behaviors organized by time occurrence, context maps, entries based on categories constructed from interviews or other observations, reaction diagrams representing interactions, debriefing questionnaires for the observer, and debriefing sessions with other researchers (Lincoln & Guba, 1985). I kept a field experience log on each of my observation sessions noting the date and time of the observation. In the log, I accounted for the various topics that were discussed, questions that were raised, activities that were occurring, and interactions among participants during the observation sessions.

During observation, a researcher should record not only what is said, but also any nonverbal communication that occurs (According to Owen (1984), these data inform decisions about what constitutes a theme). The various types of nonverbal communication can include body movement, spatial relationships, rhythmic relationships of participants, pacing, pauses, volume, voice quality, inflection, and touching. These nonverbal communications were also part of my field experience logs. It is noted that specific nonverbal communication occurrences do not need to be categorized, but the researcher should be aware of them as a supplemental piece of evidence in emphasizing other things that may be occurring (Lincoln & Guba, 1985). I coded for the nonverbal evidence observed throughout the direct observation sessions, and doing this enriched the coding process by adding to the other evidence that supported a particular code.

Direct observations were accomplished while attending the organization's various training courses, meetings, orientations, volunteer gatherings, board activities, and other opportunities. I attempted to be immersed in the organization as much as possible to get a feel for what was occurring with regard to knowledge cultivation and enablement practices, but I used the overt method of observing in that the observational subjects were aware of my presence and the intent of my observations (Patton, 1987). The subjects were observed in a natural setting during training courses, meetings, and other activities that they would normally participate in on a daily basis. As it is "crucial that the case study researchers make their identity known up front in very explicit terms" (Patton & Appelbaum, 2003, p. 69), I introduced myself at the start of the observational sessions, and I indicated that I had the organization's approval to conduct research for my dissertation and that I would take notes and observe the interactions of people during the session. I asked that anyone who was uncomfortable with this to let me know and that I would not take notes on his or her interactions. No one appeared to be uncomfortable with my presence and all participants seemed very open to my learning from their interactions. So, as to remain as unobtrusive as possible, I did not record the observations by any electronic means; instead I used Appendix E to guide my note taking.

Although predetermined themes can facilitate focused observational data collection (Hsieh & Shannon, 2005), they were not part of this research design. I wrote field-log notes of each observation experience in a section of my research notebook with regard to what was happening both verbally and, if appropriate,

nonverbally (Lincoln & Guba, 1985). This research involved continual reflection on the observations and field observation log notes taken during each organizational visit. I transcribed the field-log notes from the observation sessions and maintained these on the password protected hard drive of my home computer, in my locked residence. Confidentiality of the observation participants were maintained by making no references to name, job title, or other distinguishing characteristics in my writings.

#### *Data Collection in the Form of Documents*

I used proprietary and public documents from the organization and the three stakeholders in this research as written communication. Documentation was critical to the knowledge components under study (Lincoln & Guba, 1985; Ritchie, 2003), especially the explicit knowledge held and utilized by the organization. Additionally, documents generally cannot be altered, and, therefore, can speak for themselves at face value. All documents in the sampling frame were subjected to a thematic analysis and a constant comparative analysis process (see that section in this chapter). The data in the documents were extracted in the form of quotes or extracts, paragraphs, sentences, clauses, and phrases.

#### *Data Collection in Form of Reflexive Journal*

Reflexivity is important in naturalistic inquiry because the researcher embraces research design decisions and biases that impact the research outcomes (Lincoln & Guba, 1985). Furthermore, reflexivity allows examination into how the

research process and relationships with the research participants unfold, better ensuring the most accurate accounting of the interpretive research (Arvay, 2003). Consequently, I incorporated my own reflections and experiences in my final report (Lincoln & Guba, 1988). Data from my reflexive journal was used to establish credibility, transferability, dependability, and confirmability of the naturalistic research. My reflexive journal was used to record my thoughts about what was occurring within the research as well as notations about methods. Separate sections of the journal included a daily schedule, logistics of the study, a personal diary for daily reflection, and a methodological log for the various decisions and justification for specific choices in this regard (Lincoln & Guba, 1985). This journal was used to enhance what was occurring in my research, and to note personal reflections. It was also used in the analysis process to compare against the coded data.

#### *Data Collection in Form of a Research Notebook*

In order to facilitate my data collection, I maintained a research notebook for use at every site visit and during the analysis phase. The research notebook was kept in a binder and had the following divided sections: (a) a calendar with the various appointments and meetings related to interviews, observations, phone calls, or other meetings I had pertaining to the research; (b) dated pages for my use in making notations as to tasks that needed to be completed, follow-on interviews, or additional information needed as a result of that day's activities; (c) dated pages for my reflexive journal notes about the content of various themes encountered and for

recording my overall mood regarding the research itself; and (d) methodological decisions and related information, including a space for note taking surrounding interviews and direct observations, information about various decisions related to the methodology, and copies of the interview questions and coding sheets (Lincoln & Guba, 1985).

All files stored on my home computer, hand-written notes pertaining to my data collection, and cassette tapes from the interviews were maintained in my locked residence during the research process. The cassette tapes will be destroyed after one year, and the transcripts, hand-written notes, research notebook, and computer files will be maintained for a period of five years, at which time the notes will be shredded and files deleted from my computer's hard drive.

#### *Data Saturation Attainment*

Although I have identified general guidelines for data saturation as they relate to specific forms of data collection, I achieved saturation with my research data by stakeholder type and not by data collection type. Knowing what types of data still needed to be collected was accomplished through a deep understanding of my data and intuition, inherent in naturalistic inquiry, so I coded each item and conferred with my peer debriefers to draw out what stakeholder group or what additional information I needed, to the point where no new codes were created. I was able to determine if I needed additional information about volunteers, board members, or employees based on each piece of data I analyzed.

As I obtained subsequent pieces of data to analyze, new codes that were added became fewer and fewer. The first piece of data I coded was an interview that produced 40 open codes. Subsequent interviews added fewer and fewer codes. Other pieces of data yielded relatively few (less than ten) new codes to add to the overall coding list and lengthy interviews, observations, and documents with a breadth of data yielded 10 to 20 new open codes. The last three pieces of data I analyzed, which were documents, did not add any additional codes to the existing coding list, and upon conferring with my peer debriefers, I realized I had reached saturation. I was surprised at the number of codes that were not specific to one stakeholder group over another. For example, all of the groups focused on the strategic plan of the organization, and an interesting overriding theme occurred in that all of the stakeholder groups communicate with one another to share tacit knowledge.

## CHAPTER 4. DATA ANALYSIS PROCESS AND TRANSITIONAL FINDINGS

### *Data Analysis*

All of the sources of data for this research were analyzed utilizing thematic analysis coupled with constant comparative analysis. These are complementary forms of analysis and may be well suited for triangulation purposes to contribute to the development of credible results. Indeed, Thorne (2000) reported that thematic analysis *depends on* constant comparative analysis processes to develop ways of understanding human phenomena within a context in which they are experienced. Each time a new account of the phenomenon was encountered, it was compared with others until all were compared with each other. The intent was to generate knowledge about common patterns and themes within human experience. Data were constantly revisited after initial coding, until it was clear that no new themes were emerging.

While the data collection process was happening, I placed the interview transcripts, observational notes, and documents into a database within a computer-assisted qualitative data analysis software package (CAQDAS, Atlas.ti software in particular) and coded the data within 24 hours of collection, receipt, or in the case of interview transcripts, transcribed by the transcriptionist. This quick turnaround allowed me to decide future data collection opportunities required and determine any perspectives or information that was needed to fully answer my research questions (Hewitt-Taylor, 2001).



A complete set of files of every piece of datum collected was maintained within the software. CAQDAS was very useful in that it provides an efficient means of storing data, contains a structure for writing and storing memos needed to develop the analysis, and allows for the conceptual assessment of the data as it was displayed on the screen. As noted, the CAQDAS I used was Atlas.ti, as it is regarded as one of the premier coding software packages used by qualitative researchers (Barry, 1998), and I found Atlas.ti to be very user-friendly. I created my own codes during the analysis process, but I used the software as a mechanism to assist me with editing and analyzing my data. Moreover, I was better able to view, store, and organize the various sources of data than I would have been if I were doing it by hand. Atlas.ti allowed me to place various data in project files that could then be manipulated to create and arrange the codes and data attributed to these codes.

Atlas.ti was well suited for the analysis I conducted. The software allowed me to highlight specific chunks of text from this data, develop themes and codes required for constant comparative analysis, and tie the data to these codes and add any open or in vivo codes that arose during the analytic process. A specific discussion of the analytic framework and strategies is outlined in the following text.

### *Thematic Analysis*

Thematic analysis was the overarching analytic framework for this study. It is imperative to note that although the constant comparative analysis is discussed in

the next section, it was used in tandem with the strategies outlined in developing the codes and themes as discussed in this section.

Thematic analysis is a method for identifying, analyzing, and reporting patterns within qualitative data (Boyatzis, 1998). It is a foundational method for narrative, qualitative analysis that can be applied across a range of theoretical and epistemological approaches, giving it “theoretical freedom,” meaning the method is not bound to any particular theory (Braun & Clarke, 2006, p. 78). A *rigorous* thematic analysis can produce insightful answers to research questions (Braun & Clarke). In this research, *rigor* resulted from devising a systematic research design method for generating themes, a method whose assumptions were congruent with the way I conceptualized the subject matter or topic (Reicher & Taylor, 2005). Taking direction from Braun and Clark, I also ensured rigor through transparency in my research orientation, explicitly stating that this study was housed within the interpretive research paradigm (with attendant epistemological, ontological, and other assumptions) and then took all necessary steps during the research design process to insure alignment between those assumptions and the topic of knowledge management.

I will now share several examples that illustrate this alignment.<sup>1</sup> Within this study, I assumed a *realist or essentialist method*, which reports on the experiences, meanings, and the reality as lived and articulated by the participants (versus a

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<sup>1</sup> As a caveat, Braun and Clarke (2006) confirm that the analyst must acknowledge his or her active, creative, and iterative role in the analytical process. To that end, Foster and Parker (1995) recommend using first person when writing, a convention employed in this study.

constructionist method that examines the way society has shaped this lived experience). Second, I employed a *deductive approach* for this thematic analysis, meaning the analysis was driven by the research questions and the literature related to knowledge cultivation and enablement (rather than an inductive method, which lets the research questions evolve through the coding process). Third, because I was operating within the essentialist approach, I employed a *semantic (explicit) approach* for identifying themes without looking beneath the surface for ideologies underlying why people said what they said (referred to as a latent approach couched in the constructivist approach) (Boyatzis, 1998; Braun & Clarke, 2006). Respecting the need for flexibility in thematic analyses, some degree of interpretation also was involved (latency), despite this being a semantic approach (Braun & Clarke), because the analysis needed to go beyond mere description of the data so I could make arguments in relation to the research questions.

#### *Steps in Doing a Thematic Analysis*

The works of four scholars informed this discussion of how to do a thematic analysis: Aronson (1994); Boyatzis (1998); Braun and Clarke (2006); and Owen (1984). The discussion that follows provides guidelines and not rules. Also, this was not a linear process of simply moving from one step to the next. Instead, it was a recursive process, involving movement back and forth as needed, ongoing throughout the analytical process. Finally, it was a process that developed over time and should not be rushed (Braun & Clarke). Using the Braun and Clark model, I moved through six phases, using a recursive approach. By this, I mean I used a

procedure that was applied once, and then I applied it to the result of that application, and so on.

*Phase 1: Familiarize myself with the database.* Data sets must be in the form of written documents. All videos, podcasts, and Web site features were converted to a text format for analysis, as were interview audio tapes. If a separate transcriptionist is used by the analyst, the transcriber should be instructed to create a rigorous and thorough version of the data, replete with *verbatim* accounts of the verbal, even non-verbal (e.g., coughs, shrugs, silences) utterances. Careful attention should be paid to punctuation because commas, periods, dashes, etc. can change the meaning, leading to inaccurate data.

The final data set comprised various *data items*, in this case, four items: interview transcripts, documents, direct observation field log notes, and reflexive notes. I immersed myself in the information, starting with one thorough reading of the entire data set (each of four items). Then, I read through all of them again, repeatedly. As I read, I started taking notes in my reflexive journal and/or marking initial ideas for potential codes in the text. This entailed highlighting or flagging quotes and excerpts from the data, writing notes in the left-hand column of the paper, summarizing or paraphrasing participants' thoughts in the margins of the paper, and cross referencing ideas.

These repeated readings and note takings were done in an active way, searching for potential meaning, patterns, and so on, informed by the research questions. This deep immersion began the process of identifying *possible* patterns that began to gain shape with each reading, leading to themes. While some

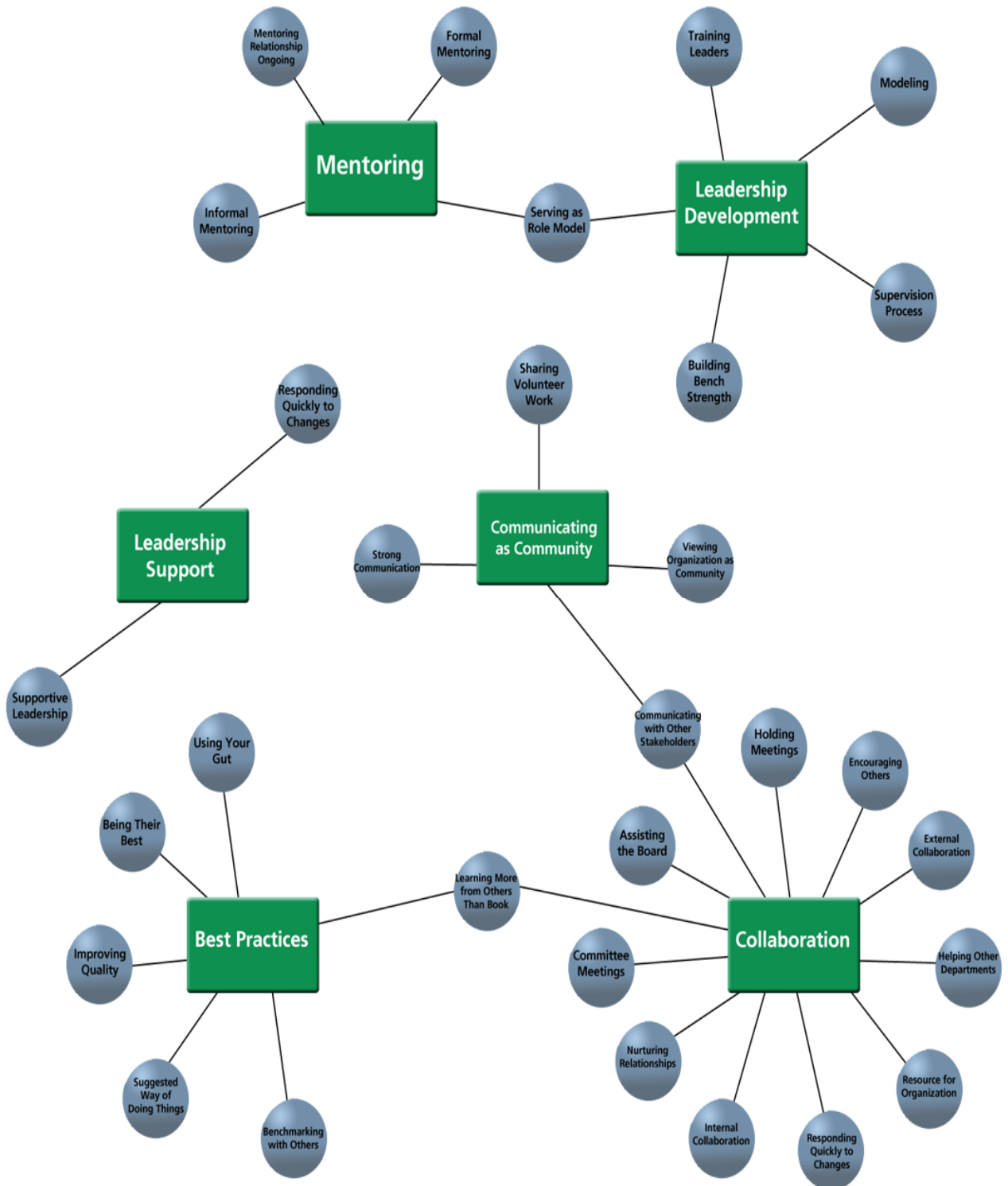
scholars use the right-hand column to begin to note what appear to be emerging themes, or insights that likely appear in a second or third reading, I used Atlas.ti's memo function and my reflexive journal to keep an ongoing log of what was occurring as I analyzed my data. The analytical process is enriched if the analyst is also the same person who transcribed the interviews, but that was not the case in this research. The result was a collection of disparate, somewhat disconnected quotes (excerpts) from the entire data set. This first phase was complete when I generated a list of *quotes from the entire data set* that were eventually collated and labeled with a word (a code, Phase 2), and then further refined to generate themes (Phases 3-5). During Phase 1, no overt attempt was made to cluster the *list of quotes* into groups (codes or themes); however, this process started in my head, as well it should during an iterative, recursive process (Braun & Clarke, 2006).

*Phase 2: Generating the initial codes.* The next step was to make sense of the list or collection of quotes and excerpts. This process is called coding, and it is a central part of the analysis because it entails organizing the data into meaningful groups, at this stage called *codes*. A code is a *symbolic* representation of a piece of information; In thematic analysis, the *symbol* used to represent the code is words. But, a code is any system of communication in which arbitrary groups of symbols (in this case, words selected by the analyst) represent units of plain text of varying length identified in the data (paragraphs, sentences, phrases). Starting with the list of quotes generated in Phase 1, I began to produce initial *codes* from that list (themes are generated in the next phase). The coding process involved recognizing

(seeing) an *important moment* and encoding it (seeing it as *something*) prior to a process of interpretation. A *good code* captures the richness of the phenomenon.

Coding can be performed either manually or through computer software. Using Atlas.ti software, I worked systematically through the entire data set, giving full and equal attention to each data item (interviews, reflexive journal notes, etc.), identifying interesting aspects of the data that *may form the basis* of repeated patterns (themes). More is said on this process in the section on constant comparative analysis. With an eye for identifying potential themes, I generated as many codes as possible, and I coded individual extracts (quotes) from the data in as many different ways as they seemed to fit together, and with some precaution, the extracts were used more than once. Also, I kept a little of the data or passages surrounding a datum (extracts/quotes) so the context could be preserved, which is accomplished through Atlas.ti's association between quotations and codes, allowing direct linkage from codes to quotations to the source document itself. Ryan and Bernard (2003) recommend keeping memos during the coding process, with the memos including: why the code is created, some detail about what the code is about, why the code is changed, and any thoughts that occurred as you coded. The memo function in Atlas.ti facilitated this process. As a preamble to the results, Figure 3 maps the relationship between a sampling of open codes, represented by circles, and axial codes, represented by rectangles, for the reader to gain insight into the analysis process. Due to the large number of codes established, it was not feasible to show the entire coding scheme in this particular map.

Figure 3. Open and Axial Coding Map for Selected Codes



Phase 2 ended when I generated a long list of codes that had been identified across the entire data set (drawn from all four data items: interviews, direct observations, documents, and reflexive journal). Better yet, once the coding process was complete, I had a list of quotations taken as evidence for each code, one list for each code (Mauthner & Doucet, 1998). At the end of Phase 2, I was no longer working with *quotes* (strings of words in the form of paragraphs, sentences, clauses, or phrases) but with two to three *words*. At this time, I also pulled together notes and (text annotations) and then began to make links between the annotations as a primer for the next phase (Smith, 1995).

*Phase 3: Searching for themes.* Starting with the code list generated in Phase 2 (a list of words, backed up by quotes and excerpts from the entire data set), I began to sort these words into groups representing potential themes. A *theme* is a concept, trend, or distinction that emerges from reiterative readings of written documents. Specifically, a theme represents components or fragments of ideas or experiences (quotes) that may be meaningless when viewed alone but have meaning when brought together (Aronson, 1994; Spradley, 1979). At this stage, I, upon reiterative readings of the entire data set, was able to see patterns that led to an integration (weaving together) of the voices and experiences of the participants—yielding themes (Kaufman, 1992). Although not used in this study, an analyst can literally create index cards or self-adhesive notes for each code and begin to sort them into different theme-piles, looking for links, connections, meaningful clusters, and combinations, which I refer to as selective codes. Atlas.ti facilitated this process through its ability to view the code file in a separate window, allowing me to

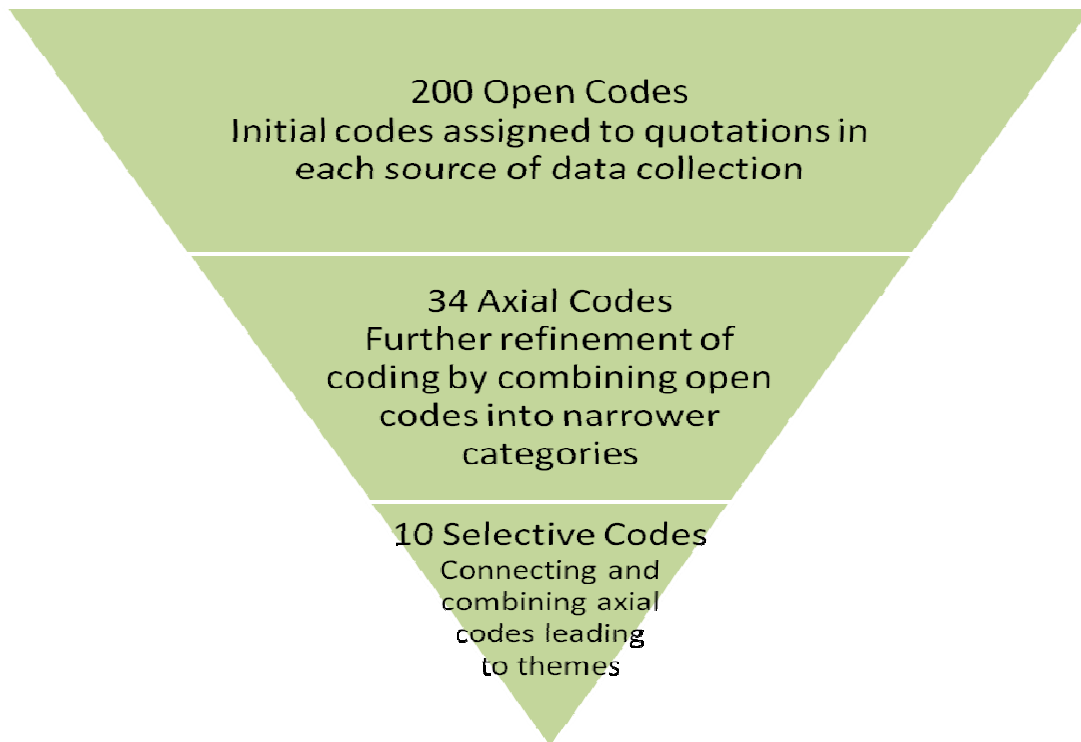


constantly view codes, their definitions, and list of quotes. Atlas.ti also has the ability to link directly to the document containing that particular quote. During this process, some codes slipped easily into themes, other codes fell into sub-themes, and some codes did not seem to fit anywhere at all. Braun and Clarke (2006) recommended that in the latter instance, the analyst create a theme called *Miscellaneous* to house these codes, likely temporarily. I followed that strategy in this study.

I took the entire grouping of axial codes and further categorized them into 14 initial selective code files in a spreadsheet based on the axial code definitions, open codes, and quotes contained in the open codes. Once the selective codes were developed, I analyzed my reflexive journal. Notes were made in the margins and sections highlighted to indicate themes to be compared to the selective codes. This comparison informed the creation of final themes by developing categories that accurately reflected the data.

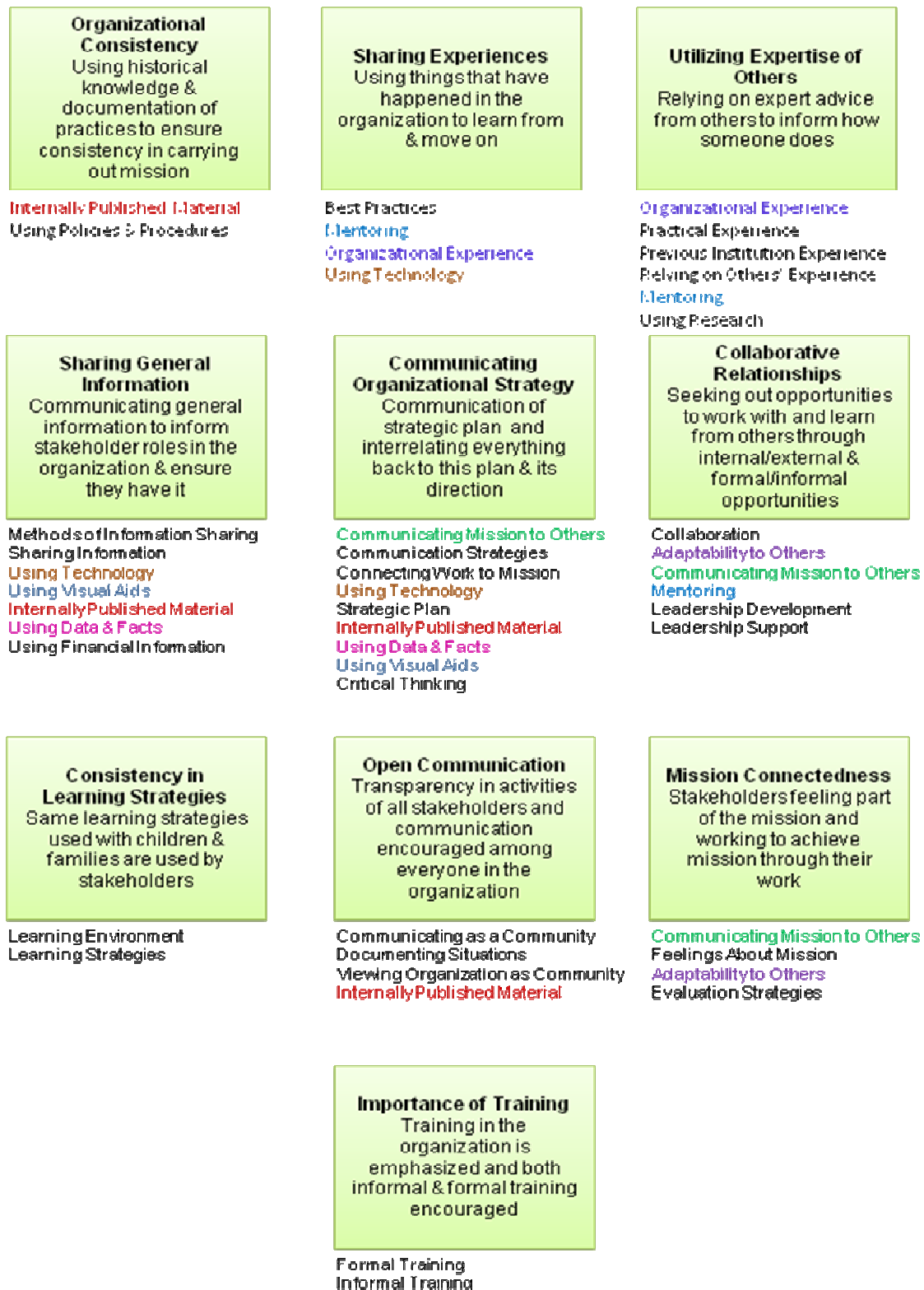
I continued to refine the selective codes until they accurately represented the entire data set of open and axial codes without being redundant. Ultimately, 10 selective codes were developed, ensuring that the axial codes fit into one or more selective codes. I present Figure 4 to illustrate the relationship and composition of the three levels of codes used in this research analysis.

Figure 4. Analysis Coding Levels



Each selective code was placed in a box with a description of it, and the associated axial codes were listed under each selective code. Colored text was used to indicate those axial codes that applied to more than one selective code category (see Figure 5).

Figure 5. Selective Codes with Corresponding Axial Codes



Braun and Clarke (2006) explained that, at this stage, the analyst should start to get a sense for what themes are more significant, but they recommended that nothing be discarded at this phase. Following their advice, the initial themes generated at this stage were changed and combined as they were compared to the reflexive journal, axial, and open codes as well as to memos created throughout the data set in Atlas.ti to ensure consistency.

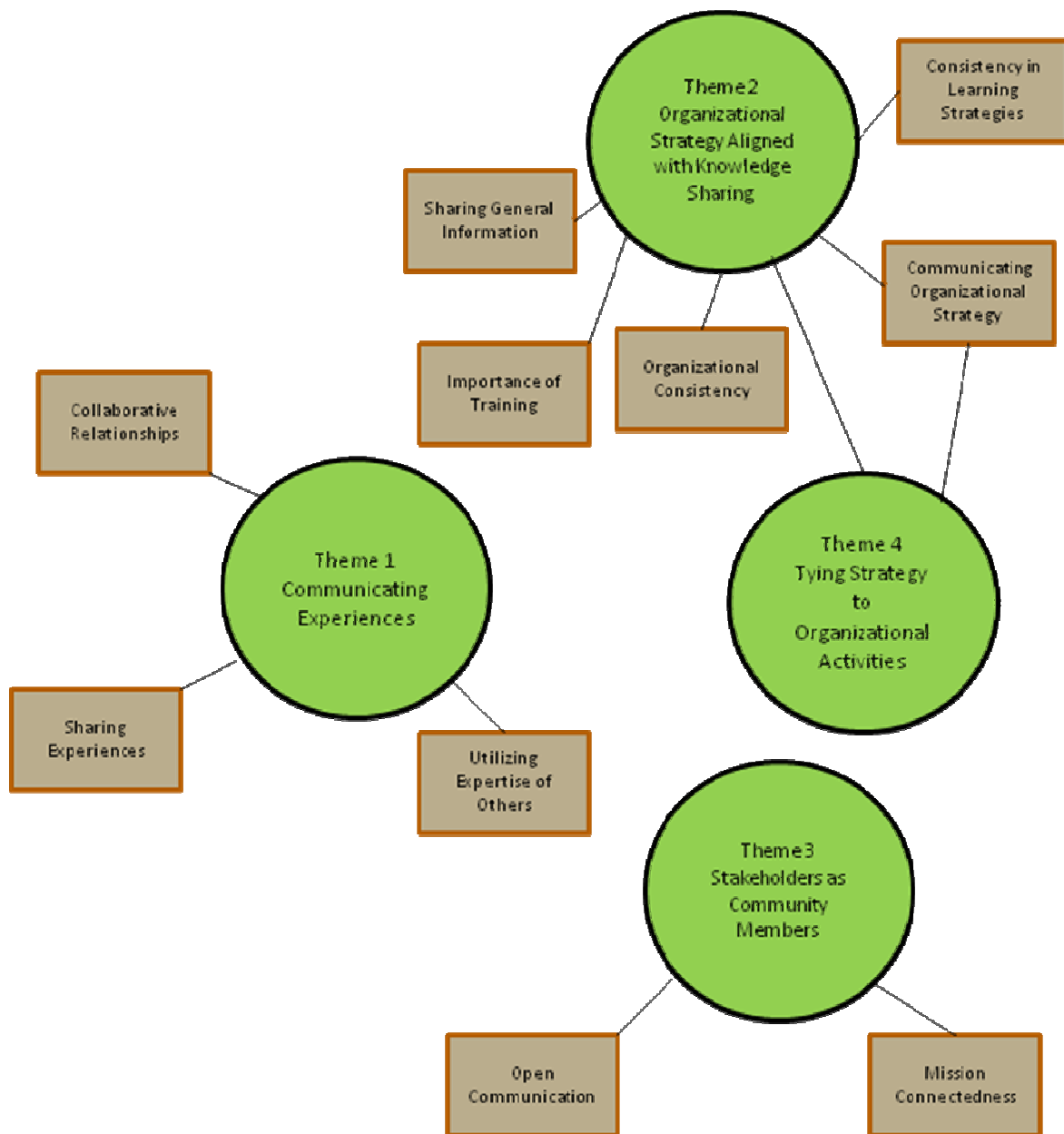
*Phase 4: Refining and reviewing themes.* Bowen (2008) noted, “whereas codes are applied to the data, themes emerge from the data” (p. 145). I created preliminary initial themes and went back through each of the three levels of codes (open, axial, and selective) and the individual pieces of data to ensure that the themes accurately captured the research. To aid me in grouping the initial three levels of coding into themes, I created a chart of my preliminary groupings of the selective codes and labeled each with the corresponding theme number (see Table 4).

Table 4. Initial Selective Code Groupings with Themes

<b>Initial Theme 1: Communicating Experiences</b> <i>Stakeholders relying on their own and others' experiences from the organization and other organizations to communicate organizational mission and share knowledge to achieve the mission.</i>	<b>Initial Theme 2: Organizational Strategy Aligned with Knowledge Sharing Implementation</b> <i>Utilizing organization's strategic plan, mission, and goals and the history behind their development to tie all stakeholders together. This helps them understand how their actions and learning relate back to organizational direction.</i>	<b>Initial Theme 3: Stakeholders as Community Members</b> <i>Stakeholders work with each other communicating and collaborating within and between groups. They define themselves as a collective entity working together toward a common goal of helping children and families.</i>	<b>Initial Theme 4: Tying Strategy to Organizational Activities</b> <i>Maintaining consistency in organizational activities and practices by tying them back to the organizational strategy.</i>
<b>Sharing Experiences</b>  <b>Utilizing Expertise of Others</b>  <b>Collaborative Relationships</b>	Organizational Consistency Sharing General Information Communicating Organizational Strategy Consistency in Learning Strategies Importance of Training	Open Communication  Mission Connectedness	Communicating Organizational Strategy

Grouping the selective codes into preliminary themes helped me create an initial thematic map (see Figure 6), which I used as a guide in rereading the collected data and reflexive journal to ensure that the themes were representative of everything.

Figure 6. Initial Thematic Map



I looked at each of the four themes and put a colored dot (blue, green, and/or orange) to correspond with the consistent color coding used throughout my analysis

and to represent my three research questions (some themes were assigned more than one color).

Based on the guiding principle that data within each individual theme should coalesce into a meaningful whole, while each different theme should be clearly distinguishable from the others, Phase 4 entailed refining the themes even further. This process began with going back to the raw data set and rereading it again — in the case of this study, rereading all of the interviews, documents, field experience log notes from direct observations, and the reflexive journal. Only this time, I tried to ascertain whether the themes worked with the data set. As well, I went back to the data generated from Phase 1 (the quotes taken as evidence for each code) and determined if the candidate themes could still be seen in the quotes. Furthermore, I examined and re-examined *Miscellaneous* code files not already associated with a theme to see if these data now had any relevance (Ryan & Bernard, 2003). If the candidate theme did not hold (the data did not fit), either something was wrong with the theme or some of the extracts originally assigned to create the code did not fit anymore (Braun & Clarke, 2006). Hence, at this phase, the analyst needs to be prepared to code any additional data that was missed in earlier coding stages, either to: (a) enrich existing themes, (b) justify merging or separating themes, (c) delete themes, or (d) even generate new themes or sub-themes.

I used Owen's (1984) work to determine what counted as a theme. Owen proposed three criteria to decide if a theme is accepted: (a) the same thread of meaning is found even when different words are used by participants (*recurrence criterion*); (b) key words, phrases, or sentences are repeated throughout the data set

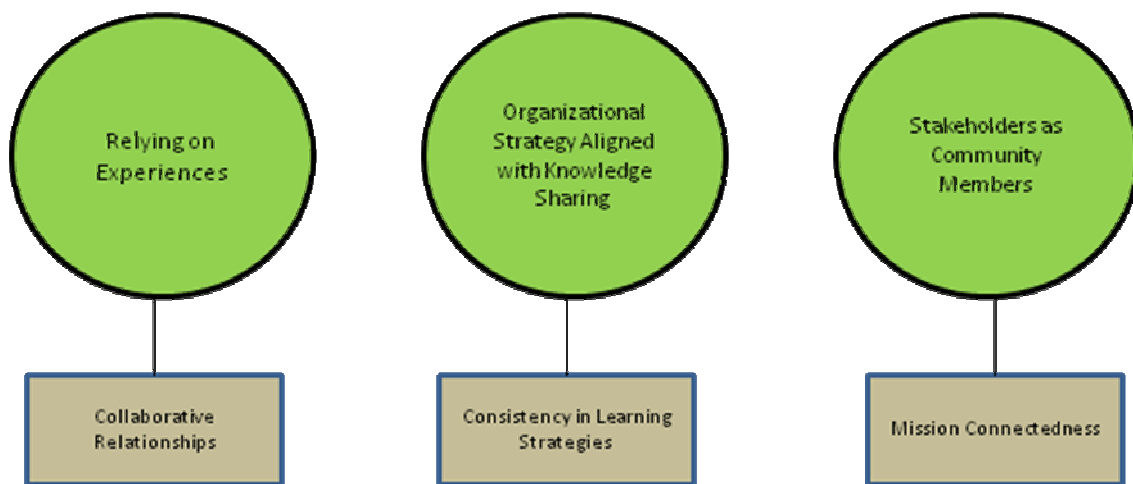
(*repetition* criterion); or (c) the incidence of comments may have been small but the passion and emotions were high when the comments were made (indicated by voice inflection, volume, dramatic pauses, or body positioning or by italics, underlining, circling, highlighting, or upper case in written text) (*forcefulness* criterion). Krueger (1998) and Morgan (1998) added two additional criteria: (d) the *frequency* or how often a topic is discussed and (e) the *extensiveness* of the comments within the data set, meaning the number of people who mention the idea. Owen strongly asserted that a theme does not have to meet all of the criteria to count as a theme. But, these criteria helped me judge whether the evidence articulated through the four data sources was strong enough to characterize a recurring, unifying idea as a theme.

Phase 4 came to a close when the refinements were not adding anything substantial to the analysis. If the process of re-coding and judging evidence is only fine tuning a coding frame that already works (the data fit), then the analyst should stop, which I did. Ultimately, as expected, the fine-tuning process resulted in fewer themes (with tentative labels), with sub-themes. Phase 4 ended when I generated a satisfactory thematic map of the data set. Based on Braun and Clarke's (2006) work, a map serves as an example of how many selective codes were combined to form a few main themes and sub-themes. For clarification, a sub-theme is an idea that nearly falls into the main category but is really an adjoining idea; sub-themes and themes share a common boundary. Sub-themes can be useful for giving structure to a particularly large and complex theme and useful for demonstrating the hierarchy of meaning within the data. After several iterations, the ultimate result was a set of three themes and three subthemes as indicated by the final thematic map (see



Figure 7), signaling the end of manipulating codes to developing themes. Each theme was also given a corresponding colored dot (blue, green, and/or orange) for the appropriate research question. Each theme addressed two or three of the research questions, a finding that will be discussed in greater detail later in this chapter.

Figure 7. Final Thematic Map



*Phase 5: Defining and naming the themes.* Not only were the final names for the themes chosen in Phase 5, the themes were also defined and described. Before assigning a final name, several steps needed to be taken. First, for each individual theme, I wrote a detailed account of the story that each theme told. This account was prepared by going back, *again*, to the data extracts generated in Phase 1 (the quotes extracted for each code) and organizing them into a coherent, internally consistent narrative. Once these steps were taken for each theme, I could better judge whether there was overlap between themes, which there was not. Writing the

thematic narratives also helped me decide if a theme was trying to do too much or was too big, diverse, and complex. Then, I had to judge whether, within a theme, sub-themes or more sub-themes were needed (or, themes within a theme). For example, after several iterations of theme and sub-theme refinement, the results were three themes and four sub-themes. The major theme “Stakeholders as Community Members” contained the two sub-themes of “Mission Connectedness” and “Open Communication.” After writing the thematic narrative for the “Stakeholders as Community Members” theme, it became evident that open communication was an integral part of defining this theme, so it was determined that the “Open Communication” sub-theme no longer held and was discarded.

At the end of this phase, I could clearly define what each theme was *and was not*, articulating the *essence* of the theme. One test for this was to see if I could describe the scope and content of each theme in a couple of sentences, with full access to the fuller descriptions. If not, further refinement is needed until the succinct description could be achieved. This point is when I gave each theme its final name and developed a final set of fully worked-out themes (and sub-themes) with solid names and a thematic map to illustrate how they are interrelated to each other.

On another note, how does an analyst know she has found all or enough themes? Strauss and Corbin (1990) referred to “enough themes” as theoretical *saturation* and have no clean answer, save that more is better. They did note that more experienced analysts find more themes in a shorter period of time and that the number of themes reached depends on the data and its complexity, as well as

investigator fatigue, experience, and the number of investigators. Wilson and Hutchinson (1990) also warned of *premature closure* wherein the analyst stops short of moving beyond the face value of the content in the data. Bottom line, although there is no magic formula, more themes are better. So, I reworked my final themes to ensure every selective code (and attendant axial and open code) fit with each theme. I also read through my reflexive journal and marginal notes I had written with themes. It was then that I realized my themes were saturated, as each theme and subtheme had its own identities.

*Phase 6: Producing the report.* In the final report, I moved beyond the description of the data and beyond a mere summary or précis of the text in the entire data set. Instead, the map of themes was analyzed and translated into a narrative, wherein the themes were outlined, justified, exemplified, and illustrated with verbatim extracts from the data. In sum, I make an argument for the findings in relation to the research questions and the literature reviewed, and the report provides a concise, coherent, logical, and non-repetitive account of the findings. I looked for what story was revealed within each theme and sub-theme and what story was revealed across themes, *vis-à-vis* the research questions. The report provides enough quotes and extracts to demonstrate the prevalence of the theme using some combination of the five criteria for what counts as a theme (Owen, 1984; Krueger, 1998; Morgan, 1998). These quotes and extracts (retrievable from the data generated in Phase 1 and organized in Phase 3) were embedded within the analytic narrative so that a compelling illustration of the story being told was evident.

As well, the analyst can use the annotated notes and memos generated during Phase 2 to recall context and reflexivity insights. For it bears repeating that the analyst should have been recording her thoughts and ideas as the project analysis progressed, which I did. The more writing done during the project, the easier it is to bring it all together into a report. It goes without saying that the final report of the thematic analysis underwent many revisions and drafts, in the spirit of the organic process inherent in thematic analysis. Redrafting took time, and it involved re-reading what had been written and then reflecting how the analysis and the flow of the narrative could be improved to ensure a rigorous account. The challenge was for the researcher to interact with the data in such a way that rich and complex insights were generated and substantiated in the report. I used the selective code categories and definitions and attendant axial codes as a guide in ensuring rich and accurate evidence was provided to illustrate each of the final themes.

The analytical claims reflected in the final report are grounded in, and go beyond the surface of, the data, even for the semantic level of analysis (used in this study). Several key questions guided the preparation of these analytical claims and informed the content of the final report (in this study, a case study informed by qualitative case study theory): “What does this theme mean? What are the assumptions underpinning it? What are the implications of this theme? What conditions are likely to have given rise to it? Why do people talk about this thing in this particular way (as opposed to other ways)? and What is the overall story the different themes reveal about the topic?” (Braun & Clarke, 2006, p. 94).

Finally, Braun and Clarke's (2006) insights into how to prepare a rigorous account of the analytical claims in the final report guided the process by: (a) not using research questions as themes; (b) doing more than paraphrasing the data or stringing quotes together without any analytical narrative; (c) using quotes that provide compelling evidence of the theme so as to avoid anecdotalism (reifying a pattern into a theme with no supporting evidence); and (d) making sure the analytical claims align with the stated form of thematic analysis (do not refer to ideological underpinnings of meanings if you say you are conducting an essentialistic analysis--their account of lived experiences). The final phase of the thematic analysis was used to inform the final case report (discussed in the last section of this chapter). The next section of the analysis section describes the constant comparative analysis strategy, which enriched theme development.

### *Constant Comparative Analysis*

Constant comparative analysis (CCA) is a type of thematic analysis that involves analyzing data and answering general questions of the data for category creation (Hewitt-Taylor, 2001; Leech & Onwuegbuzie, 2007; Rager, 2004). Constant comparative analysis helps the researcher remain sensitive to participants' views and opinions and enables the researcher to become part of how meaning is derived. The method got its name from the fact that data are constantly compared to other data from different data sources and data collection methods in order to ensure that new issues and ideas, determined by codes and themes, are developed (Coombe, 1995). A constant comparative strategy helped me build patterns of relationships

from the data and synthesize these into coherent themes. The process involved many iterations of reviewing the data for recurring themes, issues, and events, creating categories to accommodate these patterns, and seeking out new incidents of these categories in subsequent or concurrent data collection waves (Goldstein & Reiboldt, 2004). This research involved open, axial, and selective coding levels and, although they were termed “codes,” the axial coding stage was considered to be the beginning stages of the ultimate thematic development process (Brescia, Swartz, Pearman, Balkin & Williams, 2004; Smith & Shilbury, 2004).

Constant comparative analysis is consistent with the goals of narrative inquiry and the interpretive paradigm in that it considers the context and situational aspects of each datum collection occurrence in the emergent research design (Boeije, 2002). In this method, I determined initial themes flowing out of documents, interview transcripts, observation field log notes, and reflective journal entries, which then were reanalyzed and compared until all new themes or codes had been exhausted for purposes of describing the data (Hewitt-Taylor, 2001; Lincoln & Guba, 1985; Sivesind, 1999).

In order to get to the theme development, two activities occurred called *fragmenting* and *connecting*. Fragmenting was the process of looking for separate codes that materialized during the single units of data collected, while connecting allows the researcher to interrelate fragments of data to form a wholly interpretive view in a category, remembering that themes represent fragments of ideas or experiences that may be meaningless when viewed alone but have meaning when brought together, in this case by the researcher (Spradley, 1979). Consistent

fragments within each of the categories were compared for overall consistency and to convey a message or comprehensive story (Boeije, 2002).

The results of the fragmentation (looking for separate codes to materialize out of one data set) were then compared within types of data collection occurrences from the same stakeholder group. The goal of this phase was to do the connecting by looking for integration of characteristics within each of that group's participant collection activities, such as comparing two interviews from members of the same group. This process eventually produced a compilation of each group's perspectives (Boeije, 2002).

Comparison within single data collection events included looking at the data collected at the beginning, during, and at the end of the same interview transcript, observation notes, or document(s) within my research. Comparison between data collection opportunities within the same group of people consisted of comparing employee interviews with one another, comparing volunteer interviews with one another; comparing employee training courses with one another, comparing employee meetings with one another, and comparing any other similar forms of data collection with the same group of people. As will be discussed in the Transitional Findings section of the Case Report Discussion and Emergent Insights chapter, although I initially intended to gain perspectives on each stakeholder group individually, within this organization the stakeholders functioned as a collective unit with regard to their knowledge sharing. So, pieces of data were additionally compared between the various stakeholder groups.

Each piece of data was analyzed as it was collected, whether it was an interview, direct observation, or document, comparing new codes against what was already existing in the code list, comparing definitions of the codes to see if any codes should be merged and a sub-code created, and adding to the code list if any new additions arose (Aronson, 1994; Hewitt-Taylor, 2001; Leech & Onwuegbuzie, 2007; Owen, 1984). Additionally, when a new code was added, earlier pieces of data were reanalyzed to determine if the new code applied to anything in the text (Bowen, 2008). The data was analyzed as it was collected, with analysis of some data informing the ongoing collection of other data and vice versa (Hewitt-Taylor).

Each data source, such as one specific interview transcript or direct observation field experience log notes, was saved as a Microsoft Word file. The documents were saved in either a Microsoft Word or Adobe Acrobat file, depending on whether or not it could be converted into a Word format. All documents were saved as a *rich text format (.rtf)* as this is the only file format compatible with Atlas.ti. Other file formats could cause data corruption, which I learned the hard way by losing data early in the process.

The first time I read through the interview transcripts, I played back the original audio recording while reading the transcript and made necessary changes to the transcript, including punctuation, spellings, and change in tone to emphasize certain words. The first time I read through the field log observation note transcripts, I focused on the words and the accuracy of what was typed in comparison to how the notes were organized. For documents, I read through them initially and paid attention to the content, general format, and layout (Charmaz, 1990).



The second time I read through each of the pieces of data collection, I kept myself focused on the data by constantly inquiring as to what each sentence was about and how it was similar to or different from the previous sentence (Charmaz, 1990). In the Microsoft Word document, I changed the text color from black to a color representing one of my research questions in clauses, phrases, sentences, and/or paragraphs (fragments) that had meaning in the context of one or more of my research questions. I color coded each of the three research questions with a blue, green, and orange index card and used the corresponding color for the text in Word. Each time a fragment of data from the text aligned with a research question, the same color was used for that chunk of text, and I used the index cards as a visual guide in front of me as I coded the chunks of text. This initial step helped me identify fragments of text that had meaning, vis-à-vis the research questions to ensure that the text pertained to my research questions and to later be able to extract and reference during the report writing process. Once this first step was completed in Word, I imported the *.rtf* file into Atlas.ti.

With the file in Atlas.ti, I then read through the transcript a third time, this time with a mind to whether certain patterns of thinking arose in the data (bunches of fragments connected to each other – the ideas in the identified quotes were related to each other in some way) (Owen 1984). When a new code (pattern) presented itself, I highlighted it and a separate code was created in the margin and also a new code file was created. If more than one code was used for specific text, the software gave it a different color in the margin to differentiate it. I gave the code a name and a definition of one sentence or so, as recommended by Hewitt-Taylor (2001) in the

code's comment section of Atlas.ti. Every part of the data was given one code or more than one code.

If I could not develop an applicable code for a portion of the data, the data was placed into an open code category called *Miscellaneous*. After analyzing each piece of data collected, the *Miscellaneous* open code category had 61 quotes associated with it. After I went back through each of the quotes, I was able to find alternative codes for 17 of them and ended up with only 44 quotes remaining in the *Miscellaneous* open code that I was not able to give an alternative code. As an example, Figure 8 illustrates a *Miscellaneous* open code from my first interview transcript that was later reclassified to the "Learning about History" code. I also created a *Miscellaneous* axial code category, which consisted of the open code titled *Miscellaneous*, and eleven other open codes for a total of twelve *Miscellaneous* axial codes.

Figure 8. *Miscellaneous* Open Code Example

**P 1: Julia Smith Interview Transcript.rtf - 1:56 [I've learned from all the information we have.....]  
(75:75) (Super)**

Codes: [Miscellaneous]

I've learned from all the information we have, just what really made it what it is today.

In each code file, there were color coded sections from the transcript, retaining the name of the specific line numbers as well as the interview date and the pseudonym assigned and associated with the particular transcript from which the section was taken. Atlas.ti allows for assigning codes at two different levels through the editing and search features available. The first level of code files created in

Atlas.ti was accomplished using open codes, or labels that I created. Forty five original open codes were created with the analysis of the first transcript. After coding the entire transcript, the end result of the first open-coding process was the combination of some codes, which condensed into 40 open codes (see Appendix I). The second level of codes, called axial codes, were created by connecting and combining common codes from the previous label into categories using the “families” feature in Atlas.ti (Bowen, 2005). This further classification produced 14 initial axial code families (see Appendix J), and these 14 codes were modified and added to as the analysis of each data item progressed. Additionally, each of these codes was given a one-or two-line definition to aid in eventual theme development.

As subsequent data were collected, they were analyzed in a similar fashion, with new open codes being created and new axial codes, or code families, formed. During subsequent analysis and coding, each document’s codes were compared to the already existing code files and family files to look for patterns in what was already coded. During subsequent data analysis, I asked myself how what I was reading was similar to or different from preceding data (Bogdan & Biklen, 1982; Bowen, 2008) and changed the coding process accordingly.

I constantly referred to the code definitions and other quotes that comprised these codes to ensure consistency in the coding process. I used the definitions I had created for subsequent codes as well as looked at quotations to see if the code was appropriate for the current quotations or if a new code was necessary. I followed this process for interviews, documents, and direct observation field experience log notes from the data collection stage. Some of the code names were

revised slightly as I progressed with subsequent data sources. For example, an original code developed early in the coding process was “best practices never-ending,” which later became “best practices.” This label still captured the essence of the original transcript coding, but as I saw similarities in other quotes, a more appropriate code became “best practices,” so the code name was changed to reflect this. Moreover, one code created early on, titled “learning from self evaluation,” was defined as “looking specifically at how call was handled.” This definition was later broadened to encompass other instances of self evaluation and the definition was changed to “evaluation of own performance in determining how situation was handled and behavior surrounding specific activities.” Another code established in the first transcript coding was “feedback sessions,” defined as “setting aside time to give feedback to assist in improving job performance and mission enhancement,” was changed to “feedback” and eventually merged with “embracing feedback” to capture the essence as to how feedback was viewed, not just as a session or rigid tool with parameters but as an accepted practice in the organization. This new code’s definition was “culture uses feedback extensively as a way of improving and growing and enhancing mission.”

There were 200 final open codes upon analysis of all data sources. An output report from Atlas.ti was created to show the total number of quotations for each code and the definition of each of the codes (see Appendix K). The list of 34 total axial codes and the accompanying open codes used to create them was also generated from the Atlas.ti output (see Appendix L).

*Establishing Themes*

Once the open and axial coding process was completed for the four data sources, I moved on to the categorization step, or selective coding, leading further into the identification of ultimate themes. Axial codes were connected and consolidated into selective codes, using the data as evidence for the related decisions for each (Bowen, 2005), by simultaneously interpreting and explaining more conceptually what was occurring with the data (Bowen, 2008). At this point in time, the generic procedure for conducting a thematic analysis played a role because it informed the analysis (see previous section). I looked at the selective codes that were created and combined similar codes to form themes. These themes were assigned descriptions based on the codes that were included in them and each theme was given a name. Braun and Clarke (2006) referred to generating thematic narratives wherein the researcher prepares a two-to-three-sentence description of the essence of the theme (similar to preparing definitions for each code). Theme files were then created utilizing a Microsoft Word file, and appropriate sub-themes and selective codes were associated with them, as shown in Table 5.

Table 5. Final Themes

Theme	#1: Relying on Experiences	#2: Organizational Strategy Aligned with Knowledge Sharing Implementation	#3: Stakeholders as Community Members
<b>Description</b>	This theme represents the stakeholders relying on their own and other's experiences within this organization and from other organizations to communicate the organizational mission and share knowledge to achieve the mission.	This theme represents the organization's implementation of its overall strategy and goals and transparent communication of their development as a common marker for all stakeholders' knowledge development and cultivation and their work toward the mission. Stakeholders are able to see how their actions and learning relate back to the organizational direction.	This theme represents stakeholders functioning as a community with knowledge being shared collectively as an organization within and between each stakeholder group to further the mission. The stakeholders collectively define themselves through their actions as working toward a common goal of helping children and families.
<b>Sub-themes</b>	<b>Collaborative Relationships</b>	<b>Consistency in Learning Strategies</b>	<b>Mission Connectedness</b>
<b>Selective Codes</b>	<ul style="list-style-type: none"> <li>- Sharing Experiences</li> <li>- Utilizing Expertise of Others</li> <li>- Collaborative Relationships</li> </ul>	<ul style="list-style-type: none"> <li>- Organizational Consistency</li> <li>- Sharing General Information</li> <li>- Communicating Organizational Strategy</li> <li>- Consistency in Learning Strategies</li> <li>- Importance of Training</li> </ul>	<ul style="list-style-type: none"> <li>- Open Communication</li> <li>- Mission Connectedness</li> </ul>

Using Atlas.ti's reporting function, I used printouts of the attendant codes (open and axial) associated with these selective codes. I was quickly able to access associated text sections (quotes and excerpts) by looking up the open codes tied to each theme. Some codes (with attendant evidence, quotes) were placed in more than one theme file. Each theme was then populated with evidence from all four collected data sources. From there, the themes from each of the data collection

methods was attributed to each of the research questions, with some themes being attributed to more than one research question. Once every theme was assigned to a research question, a thematic analysis report was developed that informed the final report.

The memos and self notes compiled during the coding process informed the process of writing the thematic analysis report, as did the reflexive journal. The latter was used as a reference during and upon completion of the overall findings to look for any circumstances, events, or thoughts that may have influenced the coding process or caused me to bring a specific code to light that may have been prevalent in my reflections but not in the data themselves (Hewitt-Taylor, 2001). A phased and triangulated analytic approach lead to the thick, rich description necessary for research. This triangulation continued as I moved to the report-writing phase.

### *Reporting Results*

Once the data collection and analysis were complete, I wrote my report, ensuring the anonymity of the organization and participants involved in the research. As I wrote the report, I read through the data again and achieved analytic triangulation in the process of revising this report, making sure that the analysis achieved through the coding, thematic analysis processes, and reflexive journal were in alignment with the report.

### *Case Study Method*

Case study reporting can be used in conjunction with other research strategies to address research questions (Kohlbacher, 2006). This method of

reporting was used in this research study, as it has been shown as a proven method of presenting naturalistic research results in order to add to the experience, and improve the understanding, of the context under study (Lincoln & Guba, 1988; Stake, 1978). The case study method is the preferred reporting method for naturalistic inquiry because the format of the report allows the researcher to (a) increase readers' understanding as well as (b) maintain a connection with the research itself through the report (Lincoln & Guba, 1985). I employed Lincoln and Guba's (1988) four measures to address the quality of a naturalistic case study: axiomatic criteria, rhetorical criteria, action criteria, and application criteria. First, axiomatic criterion relies on patterns in the case study as opposed to cause and effect. The axioms present in naturalistic research should be reflected in the case study, including the multiple realities created through the research, mutual shaping of those realities, value influences on the research, and the role of the researcher as an integral part of the research. These protocol were respected in this study.

Second, the rhetorical criterion is concerned with the actual presentation of the case study (Lincoln & Guba, 1988). Zeller (1987) recommended four criteria for effective writing of a case study, which were respected in this study: (1) unity, in that it is well-organized and cohesive and there are no loose ends or any group that is left out from the discussion; (2) overall organization, using fictional elements to invoke readers' interest by way of using the narrative method and story line; (3) simplicity or clarity, using natural language and discussing in the first person to capture the essence of the human interaction encountered; and (4) craftsmanship in writing and rewriting the case several times so that it (a) has power and elegance in



that it is persuasive, insightful, and descriptive; (b) is creative in its search for meanings and groundbreaking questions posed; (c) is open to reinterpretation and presents an exploratory nature to the reader; (d) demonstrates the process by which I drew my conclusions, how they were interpreted, and my constructions; (e) is passionate in describing the research; (f) is an honest discussion and open to criticism; and (g) represents all participants and points of view equally so as not to give more weight to one group over another.

Third, the action criterion includes facilitation of efforts on the part of those affected by the research study and others reading it. It involved making clear steps explicit as to where the organization under study can go with the information given (Lincoln & Guba, 1988).

Finally, the application, or transferability, criterion allows the case study to encourage application to a reader's own situation (Lincoln & Guba, 1988). The benefits of the case study reporting were that it allowed for: (a) the reconstruction of events so that the reader has all of the information in order to draw parallels between this study and the reader's own work; (b) the demonstration of relationship and interaction between the researcher and participants, allowing the reader to see how the interdependence between the two unfolds; (c) the determination as to the level of bias on the part of the researcher in relation to the underlying issue and site; (d) consistency in style, facts, and trustworthiness of the overall research as each new piece of information gives another point of consideration to assess interpretations; (e) thick description needed for transferability decisions on the part of the reader; and (f) an assessment of context for the reader, allowing the description

of context to be completely developed in order to wholly understand the topic being explored. The preliminary outline for this report is detailed within the research protocol (See Appendix C); the outline utilizes Lincoln and Guba's proposed structure and incorporates the research topics and other standard topics.

### *Comprehensive Member Check*

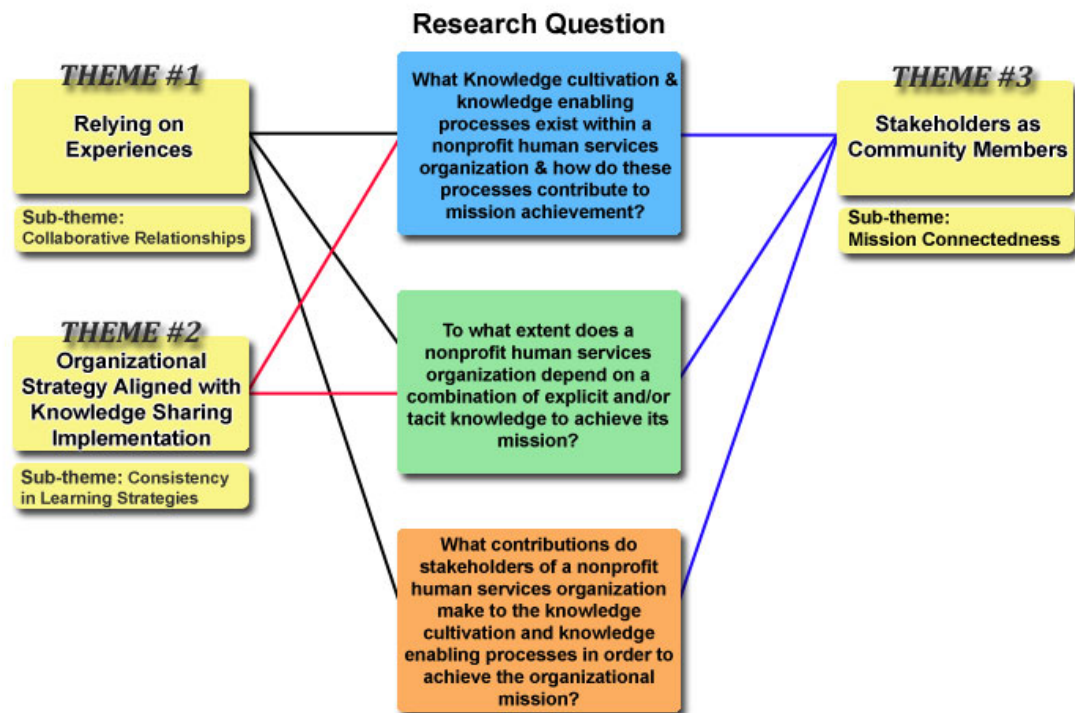
Once a report is written, Lincoln and Guba (1985) contended that in order to add to the credibility of the research results, a penultimate draft of the report should be presented to a review panel consisting of research participants and non-participants in the organization for overall vetting as to the factual and interpretive nature of the findings. Contrary to this strategy, I am employing the standpoint of Akeroyd (1991) and Padgett (1998) in that such a practice would expose research participants to a loss of privacy. Therefore, the comprehensive member check I conducted was solely with the gatekeeper. I asked that he or she read the report and make comments as to his or her comfort with any issues pertaining to anonymity as well as any inaccuracies of fact, which were readily addressed prior to preparing the final report.

### *Transitional Findings*

The results of the thematic analysis for the research produced three primary themes and three sub-themes. Evidence for what constitutes a theme stems from the five criteria from Owen (1984), Krueger (1998), and Morgan (1998) as follows: (a) the same thread of meaning was found even when different words were used by participants (*recurrence* criterion); (b) key words, phrases, or sentences were

repeated throughout the data set (*repetition* criterion); or (c) the incidence of comments may have been small but the passion and emotions were high when the comments were made (indicated by voice inflection, volume, dramatic pauses, body positioning or by italics, underlining, circling, highlighting, or upper case in written text) (*forcefulness* criterion); (d) the *frequency* or how often a topic was discussed; and (e) the *extensiveness* of the comments within the data set. Each theme relates to my original research questions (see Figure 9) and is discussed in the following section with accompanying quotes from my interviews and evidence from other forms of data collection. The themes will be first described in detail and later used to inform the case study report in the next chapter.

Figure 9. Themes and Research Questions



### *Theme 1: Relying on Experiences*

The “relying on experiences” theme represents the stakeholders relying on their own and others’ experiences within this organization and other organizations to communicate the organizational mission and share tacit and explicit knowledge to achieve the mission. These experiences are crucial to the organization and most are well documented. This is evidenced through the reliance the organization places on internal and external experiences.

*Internal experiences.* The organization places a lot of emphasis on organizational experience as it relates to both career advancement and mission achievement. The organizational experience was evident with the nine people

interviewed, and the many others involved in the 12 direct observation sessions. The majority of the people interviewed and observed had been with the organization more than 10 years, serving multiple roles during this time, and they utilized examples from this experience. In every training session I attended, the trainers referenced examples and stories as to how they accomplished things through their previous organizational roles and then shared that knowledge with the trainees in order to help them do their jobs and understand their roles in the organization.

The “newer” employees to whom I was given access to interview had tenures of at least two years. Some of the employees participating in the pre-service orientation sessions were not necessarily new to the organization but were entering new positions in the organization and needed to be oriented to this new role. As a result, discussions around the stakeholder’s own or others’ experience were prevalent in the majority of the interviews and observation sessions. Of the three volunteers interviewed, each had been with the organization four to nine years. One of the volunteers noted that she serves the organization in two different departments and utilizes expertise from each to inform her roles.

During one interview, Janine ( a pseudonym), an employee, referred to the shorter learning curve for those starting a different job in her department who had previous experience in the organization.

*If somebody has worked at [the organization] before, we know that it’s gonna be less than 40 hours [to train them]. If somebody’s never worked at [the organization] before, we can guarantee that it’ll be at least 40 hours.*

Internal knowledge and development of experiences is important to the organization as evidenced by the importance it places on its formal leadership

training program. The following excerpt from an internal document exemplifies this point:

*The Program began in early 2004 and is a six-to-nine-month training experience. Each trainee has an individualized learning plan that outlines the learning competencies, experiences, and timelines for successful completion. Twelve employees go through this program every year.*

The program focuses on helping up-and-coming leaders gain experience in various parts of the organization. The objectives of this program are to develop learning competencies. As part of this, a learning plan is developed to ascertain where experience is needed by the employees. The employees are scheduled on a rotation to work in the areas that they have the biggest need to learn in relation to their previous experience in the organization. Additionally, knowledge area assessments are conducted throughout the nine-month leadership program to determine competencies that have been achieved and those that are still required. The organization places a critical requirement on building “bench strength”<sup>2</sup> by having developed leaders with organizational knowledge and experience to help grow the mission of the organization.

The more a stakeholder knows about the organization, the better he or she is able to impact the mission, even if it is something external to his or her department. For example, if an employee receives a phone call that should be handled by another area, by sharing in the experiences of others in his or her own department or other departments as to how to handle the caller, that employee is able to quickly

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<sup>2</sup> “Bench strength” in this context refers to the quality of leadership skills of those on the “bench”, who will eventually serve as successors for those currently in leadership positions.

get the caller to the right area or department where someone will be able to help, all of which leads to achieving the mission.

Janine discussed her department being an asset to the rest of the organization in terms of being able to assist other departments:

*I feel like being part of that department ties us in a little bit more, and we've got projects coming that we're gonna be helping a lot of other departments with partially because we have phone systems. We can make phone calls out. We've got people that work 24 hours a day, so I think we're an asset with a lot of other departments.*

Some of the board members who have served the organization over the years have been former employees or volunteers or have utilized the services of the organization in some manner, which can inform their, and the other board members', knowledge about the organization by bringing in the experience from other perspectives within the organization.

During one of my observations, it became apparent that Margie, a volunteer who has served for nine years simultaneously in two different departments, was a great asset to each department because she was able to help her fellow volunteers see the bigger picture as to how one department helps another.

*External experiences.* Knowledge obtained external to the organization is valued as well, as most of the stakeholders referred to tacit knowledge obtained through external experiences that they use to do their jobs. Using experiences from other external organizations can bring a fresh perspective or an alternative way of viewing an issue. An employee, Raefe, discussed the importance of his knowledge gained from other institutions and how he shared that knowledge in order to contribute to the mission of the organization:

*So I was able to bring a different objective view of how things were being done. We were entering into a phase where at [the organization] we kind of reached our maximum without converting to the normal application of services outside of [the organization] and it was harder and harder and harder to get kids because states were wanting to keep them closer to home. There was a push to get kids outside of [service area] and so what I was able to do was to bring perspectives from multiple states that I had either worked in or consulted with to bring that perspective to [the organization] to help us go to the next stage in our application of services.*

Similarly, Margie, a volunteer, recounted her experience in helping a child in the organization by utilizing her expertise from a previous employment experience:

*I worked as a communication assistant with adult handicapped so you learned because it was difficult for them to know what it was you wanted of them and they were...they were a lot like the elementary children over here like they, you know, they didn't want to do this, you know. So you have to be creative in...in looking at different ways to get people to do what you want them to do and what's good for them.*

*Methods of communicating experiences.* An important practice in the organization that allows stakeholders to communicate best practices and experience is role playing and documentation of proven methods of approaching situations in dealing with children and families. I experienced this role playing through several direct observation sessions, particularly in the organization's employee pre-service training. The trainers in the pre-service training had a manual with scenarios mapped out where one trainer would portray a child, the employee would interact with this child, and another trainer would make notes and give feedback after the employee was finished acting out this scenario. Additionally, the organization recorded recreations of interactions in dealing with their family clients, children, and external certifying professionals. These role plays and recreations were also videotaped utilizing veteran employees, shown in training classes, and posted as videos on the training Web site for review purposes.



Best practices and experiences were additionally communicated by way of the organizational intranet site where stakeholders can listen to podcasts or streaming videos of others within or outside of the organization sharing specific experiences. One particular video I viewed was prepared by an internal marketing expert. In this video, the marketer discussed the concept of “branding” as it relates to organizational activities and enhancing the mission. The company intranet site also contained videos recorded from live presentations in their “presenter series” on a wide range of topics from talent-based hiring and human resource legal issues to specific learning strategies used in the organization.

Additionally, the importance of story-telling and relating things back to the history of the organization as a way of communicating experiences are practices that are entrenched in the organization. Throughout every interview, observation, and document, there were several variations of the same stories about the organization’s founder and the challenges he encountered that were related back to the present day. Stories were also shared about mission-related perceptions of those external to the organization. One interviewee, Julia, who is an employee, recounted her experiences with sharing stories about the organization and its mission:

*Sometimes I’ll say this one man told me as he walked out the door, “You know I bet [the founder] had no idea, you know, that this would ever become this and if anyone ever says that one person can’t make a difference they should come here.” He had a tear in his eye as he walked out the door. And it’s stuff like that that happens to me every week when I’m there, and I just share those things with [others] and it’s just the neatest thing to meet people who...who want to learn about it or who were there and want to share it with other people.*

Emily, one of the volunteers, recounted the following about her experience of sharing stories with those visiting the organization as well as her own family and friends:

*A lot of people come in. Some of them share their stories and experiences, which you then sometimes pass on to other visitors or friends and family that you're talking to.*

### *Sub-theme 1: Collaborative Relationships*

Collaborative relationships are an extremely important element of communicating experiences throughout the organization. Two of the organization's core values include internal and external collaboration, and it is evident. Various collaborative relationship illustrations were communicated passionately by the stakeholders, and several of the stakeholders were quite emotional in discussing the collaborative work they have done with others and how doing this effectively can lead to better mission-related outcomes. The stakeholders realize the need to foster collaborative relationships to ensure ongoing support of one another. Furthermore, the organization's encouragement of these relationships is demonstrated through its reliance on both internal and external collaboration. Additionally, the organization has both formal and informal methods of collaborating internally, including mentoring activities.

#### *Internal Formal Collaboration*

The more structured internal collaboration includes (a) mentoring opportunities, such as those found within the organization's leadership development program, and (b) meeting agendas where openly collaborative dialogue is part of the

culture and people share ideas, give each other suggestions, and collectively solve problems. The current leadership is trying to make mentoring an ever larger part of the organization by implementing a two-fold performance evaluation process, giving managers the opportunity to coach employees as to how to achieve the mission and have a positive impact on people in the process, which Raefe discussed:

*Our new structure that [the executive director] is trying to implement within our organization has two concepts. One is what [the employee] is doing, which are the objectives, the outcomes that we look for out of their job performance. The other is the personal behaviors and that's what we refer to as the "hows." How are they reaching these objectives? If...if they're meeting their goals and they're meeting their objectives, but they're upsetting people in the process, then [you discuss] is that good or is that bad?*

The leadership training program also has a formal mentoring component, as discussed by Raefe:

*The mentoring program that they're doing with our administrative trainees is more of a management leadership mentoring program that we hook them up with one of our better leaders and let them get assignments, shadow, discuss why things were done the way they were done, answer questions, target it to their goals, find out where it is they're going after they leave the training program, and then try to relate it to where they're headed.*

Another important internal collaboration tool is the organization's use of meetings. This was evident in all stakeholder groups, but particularly with the board. I reviewed documents pertaining to board meetings, which all referenced the board's use of regular and committee meetings to collaborate with other board members to achieve best practices in the organization. Jens, the board proxy, discussed the collaborative process, through board and committee meetings, used to improve things in the organization:

*What is the class of 2004 which came in and now it's, you know, gone through one three-year term and beginning the second. Classes have personalities*

*and of course it's the chemistry of the group together, of the individuals too as a group, and so each one is different. The group that is with us right now is... has someone who's very much an activist in looking at are...we...Do we have the processes in place? Are we thinking about these things the way we want to think about them? This is not the...the kind of thing that results in bureaucracies. This isn't what this guy's goal is. This guy's goal is to set up processes to empower the staff to do things on their own and to clarify what issues they want to raise it up beyond the table here into an area of issues, and we have been very successful in developing instruments...which help define those responsibilities and clarify them.*

During one departmental managers' meeting I attended, the various attendees included an "assistance needed" section in their individual reports back to the team. The manager would articulate the type of knowledge or expertise needed and what others could do to help. As this strategy demonstrates, helping one another and collaborating is not just something that is talked about in this organization; it is a way of life. Managers truly depend on one another and their experiences to have the greatest amount of impact on families and children. One manager, during this same meeting, referenced seeing in the organization's newsletter that another area of the organization required help with a weekend activity. This manager and her entire department responded to the request.

#### *Internal Informal Collaboration*

In addition to the formal opportunities for collaborating in the organization, informal collaboration is also widely used, a practice that I observed quite frequently, particularly during training and meeting observations. Informal collaboration arose in response to curiosity about how others do things and also as a way of being helpful to fellow stakeholders. Internal collaboration occurred during daily activities, in hallway conversations, over lunch, and during social events, and these collaborations were not planned. In an interview, Janine discussed how informal

collaboration and learning from listening to others and how they handle situations can help people see things in a different way:

*I provide advanced training and that information a lot of times is from experience myself or from experience listening to their calls and what works, what doesn't. So you know, in those kind of situations I feel like I mentor all the time, and it's helping people look at things differently sometimes.*

A volunteer, Cindy, discussed her reliance on both her fellow volunteers and employees for their opinions and suggestions as to ways of accomplishing tasks in the organization:

*I will go to [another volunteer] a lot to just sometimes talk over something that we're doing, and ask "Which way would you look at this?"*

Another volunteer, Margie, also felt that she learned a lot from employees and other volunteers in order to do her work:

*When I first started, the other volunteers were very helpful. [The Director] showed me exactly what he wanted me to do and then when I actually sat down to do it, it was very helpful to have a table full of peers that would help me.*

Furthermore, Chip, an employee, discussed the collaboration he experienced in the organization:

*It's nice that people call on you and ask for your help. You know, even as, like, I don't know what I can do, but I'll take a look at it so, you know, it's...it's all areas and it's...it's whether it's investments or people downstairs in IT. You know, they call us for things that we...we may need electronic security of messages. I'm sure you've heard about that. Saving messages for like 700,000 years to show them in court. That's a big discussion right now. So, we're doing a lot of corresponding back and forth on what the future's gonna be so everybody taps into everybody's knowledge here. You rely on one another. In different departments. I mean, you heavily rely upon each other no matter who you are. You have to have a good working relationship with those people. Organizations don't survive if there's, you know, if there's contempt among employees or the supervisors.*

### *External Collaboration*

A great deal of collaboration occurs internally, but the organizational stakeholders also work with those external to the organization to achieve the best results for children and families. Most of the externally published documents I analyzed related to stories on specific collaborative efforts with other nonprofit or governmental organizations to improve things for children and families. The true essence of collaboration is captured not only in the activities but with the mindset that is expected from these collaborative relationships, as Raefe stated.

*What does that mean for collaborating with people outside of [the organization]? And what I want from my area is I want our folks to have any time we have interaction with anybody outside of [the department] and inside [the department], they walk away with a smile on their face.*

The organizational stakeholders utilized external collaboration on an ongoing basis and tapped those they have collaborated with in the past to seek out experience and best practices for new and complex situations. Chip discussed his experience with using external collaborative relationships to tap knowledge that did not exist in the organization:

*There's no way you can just run it all from here. You have to have help because without [those collaborative relationships] there's just not enough hours in the day nor the knowledge. I mean there's no way you can keep up with all the changes so, we have our...we have our...our...good firms that once we work with them and find out how they are, we just refer back to them, and if there's something that they can't answer, they always know somebody else on down the line...*

### *Theme 2: Organizational Strategy Aligned with Knowledge Sharing Implementation*

A second theme that emerged is the organizational implementation of its overall strategy and goals and the transparent communication of strategy and goal

development. By openly communicating the strategy and goals, they served as a common marker for all stakeholders' knowledge development and cultivation and their contribution toward the mission. The stakeholders in the organization continually communicated the strategic plan as an actionable derivation of the organization's mission, which helps each stakeholder understand how his or her actions and learning relate back to the organization's direction, strategy, and mission. The organization recently went through its most current five-year strategic planning process to produce 11 strategic plan items. This process allowed the organization to take its overarching mission and factor it down into a strategic plan as to how it will accomplish its mission.

Alignment with organizational strategy lays the groundwork for critical thinking and questioning practices in the organization to make sure actions are consistent with what the organizational governance is trying to accomplish. In interviewing Jens, the board proxy, he felt that it is essential for the board members to use critical thinking and give open and honest communication to further the goals of the organization:

*We don't need all the happy talk about "oh you guys are loved." You know what we really want to know how can we do better as we're looking ahead, not looking back. So, they do that and they do a very responsible job about that. They are not afraid. There's no inhibition talking about that or raising the question or saying "Can't we do a better job about X, Y, or Z?" [They communicate that] at the board meeting, typically, or at one of the committee meetings.*

#### *Utilizing the Strategic Plan*

When the five-year strategic plan was initially created, it was communicated in great detail to the organizational stakeholders. Paul, one employee interviewee,

remembered how survey results from externally conducted surveys were communicated to all employees and were also, in turn, used to guide the establishment of the strategic plan:

*Those [survey] results were...were told to us in different meetings and stuff like that through the administration. Every employee pretty much got to know what the results were because, quite frankly, they...they develop our strategic plan around it.*

The strategic plan is further refined into goals for each of the elements of the strategic plan, and, in some departments, the goals are further distilled to relate to departmental activities. I experienced the relation of the strategic plan to the organization's work in every observational session I attended. The stakeholders referenced a specific item in the strategic plan and then said how it related to what they were trying to accomplish in the department or as justification for undertaking a specific project or activity. Raefe shared his reference to, and reliance on, the strategic plan as he uses it to incorporate his overall responsibilities in the organization:

*I refer back to the strategic plan. I am responsible for initiative number four and am constantly keeping that up to date. I monthly review all of my staff, my direct reports, for those areas that I have, and they've gotten goals and objectives that they have and timelines they need to meet.*

In almost every interview conducted, meeting observed, or document reviewed, discussions around why a particular action took place or how a decision was made were tied to the organization's strategic plan. Without even having looked at the strategic plan itself, I could piece together its components because each of the plan's initiatives were vocalized verbatim as to "this is something we need to do because it addresses this specific strategic plan item." Additionally, employees,



volunteers, and board members expect organization-wide updates about stakeholder accomplishment toward the strategy and strategic plan items.

*Use of Explicit Material*

The strategy and attendant goals were communicated not just through knowledge-sharing meetings, but they were also communicated through explicit means as well, in order to foster knowledge sharing. The organization collects a variety of data and statistics as to service outcomes, its financial condition, and other information. The stakeholders extensively utilize internally published material, including newsletter articles, policy and procedure manuals, data sheets, and financial information, as a mechanism to transfer and ground their tacit knowledge in data that is consistent in the organization.

Every data collection opportunity that referenced the strategy of the organization cited internally published materials as a mechanism to learn and share a common knowledge base with other stakeholders. In one internal publication that I analyzed, the strategy was referenced in terms of one service area's expansion plans:

*As part of the [Organization] Strategic Plan, we are committed to expanding the evidence base of the [specific service].*

In locations for observational sessions and in every building I visited, hanging on the wall were pictures and posters of the organization's mission, components of the strategic plan, and goals that relate to the mission. The mission itself was also posted throughout offices, conference rooms where board members and employees held meetings, and in volunteer work spaces. Moreover, most of the documents I

accessed from the organization contained data and facts relating back to the direction of the organization. Additionally, descriptions of the organization's strategy appeared in externally-published newspaper articles. These descriptions were in the form of direct quotations from organizational representatives.

Consistent with knowledge sharing, and the penchant for communicating said knowledge, it is necessary for the organization to have consistency in how its stakeholders share knowledge through policies and procedures. These policies and procedures guide the high quality of services the organization seeks to provide, consistent with the mission and strategy. The policies and procedures used in the organization range from addressing daily job content to overall rules and philosophies of the organization. Julia discussed how policies, or rules, helped her learn in a consistent manner when styles vary in different parts of the organization:

*I was in different [sites] working with different styles and not every [site] has the exact same rules. The basic [organization] rules and philosophies are in every single [site], but when you get down to individual [site] rules things are a little, [or] everybody's style, is a little different. So, I've learned from all of these different styles by relating back to the [organization] rules.*

I reviewed several policies and procedures in the organization as part of my document analysis. Some procedures consisted of word-by-word scripts as to how to discuss specific issues with clients, while others consisted of manuals explaining the types of paperwork and reports that are necessary for documenting specific job tasks. All of the organization's policies and procedures appeared to be created to ensure consistency with the mission and addressed specific daily job content to help control ambiguity in how a particular situation is handled. Janine discussed her

department's use of a policy and procedures binder with sectioned areas for various types of information that the employees needed in the department:

*We have binders with information and that can be anything from phone numbers to chronic callers to how to do brief communication with somebody who speaks Spanish, [and information on the organization's] programs.*

### *Sub-theme 2: Consistency in Learning Strategies*

In addition to knowledge sharing being cognizant of the organization's strategy, learning strategies were aligned around the overall strategy as well. As a sub-theme of the extensiveness of the organizational knowledge alignment with its strategy, learning strategies are consistent in that they are extended beyond just how those in the internal organization learn from and teach one another. The organizational stakeholders utilize the same learning strategies that they practice with other stakeholders and with the children and families that they serve. Raefe, an employee, discussed his view of the organization's learning environment:

*If you created a learning environment where learning is a profitable venture, and I don't mean monetarily, but either positive in a relationship, positive in attitude, positive in effectiveness, that...that culture can stimulate a lot of mentoring opportunities, and I think for our organization learning is valued. And that does foster that. I cannot say we're at a 100% in that concept, but I think overall the concept is there.*

### *Constructive Feedback*

One of the learning tenets consistently practiced in the organization is that of giving constructive feedback. The practice of feedback is expected and utilized within the organization to improve the quality of work performed. As well, it is a mechanism to learn and grow in one's role. Feedback is also utilized and expected when working with external clients to help them help themselves improve their

specific situations. In almost every observation I attended, I saw some type of feedback being given. It was immediate, direct, and expected whether it was in a meeting with two colleagues or with a trainer coaching a new employee. It was also brought up as a topic in almost every interview I conducted.

Every stakeholder seemed to appreciate this learning strategy as they were always prepared to accept feedback, whether good or bad, and use that feedback as a learning opportunity to improve. An excerpt from a document given to a group of volunteers references feedback as part of the volunteers' roles:

*Volunteer Role: What is my job as a [volunteer]? Your role is to work with an assigned child using pre-selected materials in math or language arts to help that student further develop his/her academic skills in math or language arts. You should always provide encouragement and positive feedback to the student for any progress and achievement they make.*

One employee, Raefe, discussed his view of the organization's use of feedback:

*....One of the things that a lot of organizations do or don't do is they don't give a lot of feedback. One, because feedback's perceived as negative. Here we try to embrace feedback because the only way to help us improve is with feedback. And you know it comes and goes but sometimes feedback can be perceived as a threat and sometimes it can be seen as helpful. And what we try to do as a management, as a culture, maybe, and within the organization is make feedback helpful, so that even if it's critical feedback, it's presented in a way that is helpful to improve the performance of people at [the organization]. And any time we talk about giving feedback or any time we talk about doing an analysis of something, the design is to help every employee at [the organization].*

Another employee, Julia, discussed her experience with receiving feedback in her role:

*...we would do feedback every single night...critique, and I would always ask for what I could do better. Or if they [supervisors] weren't present for a situation to overhear me, I would play it back to them, and say "Here's what I did. Here's what the child did. You know, how would you have done that differently?"*

The board uses feedback extensively, particularly utilizing self-evaluation mechanisms, as Jens discussed:

*And in fact one of these goals in here, if I may say, really gets to that [question]. "How satisfied are you that your fellow trustees take advantage of opportunities to enhance the organization's public image by periodically speaking to opinion leaders and others about the work of the organization?" And mostly what they [the board] come to us with are practical terms, issues that we need to address better. In other words, we're not meeting the information needs of people out there and they're sensing that "Hey, I think we need to explain this a little better because people don't quite understand it in my opinion."*

### *Continual Learning*

Another illustration of the consistent learning strategies in the organization is the fact that the organization's environment promotes continual learning, as this was constantly expressed and promoted by the observation subjects and interviewees.

One employee interviewee, Chip, discussed the continual learning that he feels is supported in the organization:

*This might sound strange, but pretty much every day that we talk to somebody it's a form of education. You know it's the same thing that I say, I mean, you learn something every day. I may not be able to tell you what it is, but a week from now I can say "Hey, last Wednesday we did that. We talked about that. I remember that. You know we did that at one point." So it may be something that sticks out or something that you have to think about. Geez, I really did learn something today. You do [learn] sometimes; you just don't realize. It may seem not important at this time and stage, but two weeks, a month later, or two years later it may come to be a major factor.*

This lifelong learning principle is also illustrated in the board's orientation policy statement that the orientation process is ongoing for board members.

*More than one [orientation] session may be required. Orientation is considered as an ongoing process and also is accomplished through presentations during board and Committee meetings.*

Margie, a volunteer, expressed her thoughts on the continual learning in the organization:

*The environment here is very open to wanting people to learn new things. ...it's more of a learn as you go type of thing because once you're here for awhile you'll say "Oh I...I don't know how to do this." And they'll say "Okay, well let me show you how to find this."*

Similarly, Paul, an employee, discussed his experiences with the abundant information and continual learning:

*The thing about [the organization] is there is just so much information. And it's like you find yourself using certain information then you move away from it and you go to something else and then go to something else and things have different impacts on different people. So you find that you're constantly just learning new information all the time. You know, all the time. Sometimes, like, [the organization leader] will be talking about something. I try to model a lot of what I'm talking about with what [she] says. I follow [her in presenting] in an orientation for all of our employees. [She] goes on right before I do and I'm always...[she's] always kind of mentioning something or something different that I might not have known per se and so I...I use a lot of this information cause I want to be putting out the same stuff that she's putting out.*

The continual learning in the organization is supported by formal and informal training. The organization has a comprehensive training department dedicated to offering a variety of training courses and programs utilizing a face-to-face classroom style that incorporate videos, PowerPoint slide shows, and other visual aids. The courses also incorporate a variety of activities involving the participants, and the participants are given books and manuals to supplement the content that is being delivered by the instructor. The formal training sessions are also available to be viewed online on the organization's training Web site. Many participants in the observation sessions commented that being able to review training online after they had taken it was very useful.

Informal training and learning is also prevalent in the organization as there are many examples of situations where formal training is not available due to the

unique content of the situation, so the stakeholders participated in more informal learning. Janine discussed her experience with a situation where no formal training was available and the people in her department had to learn things on their own to handle a specific situation:

*So, when it comes to when we started taking more [of a particular type of] call, there was not really somebody at [the organization] that provided us with the information. So, it was gathering information, reading books. Really, we were able to go to a couple of different trainings, but it was very much we had to gather that information because what we did was different. I mean there were times where we would get other people's input on things and...and a lot of times people with doctorates were deferring to us.*

### *Theme 3: Stakeholders as Community Members*

The final major theme was very enlightening and the most surprising to me in the research. I started off thinking that I would be evaluating each stakeholder's contributions on their own and then looking for patterns in the knowledge sharing practices they used within each stakeholder group. What I discovered, however, is that knowledge is not just shared within each group but it is collectively built as an organization. This theme involves each of the stakeholders working within and between each stakeholder group and functioning as a community in their reliance on each other's knowledge to further the mission. The term "community" is used in this sense to refer to a group sharing common interests through participation and fellowship and working together toward a common goal, in this case, the organization's mission. The community theme is demonstrated through the constant reference to utilizing others in the organization to work with toward accomplishing the mission. The term "community" was also mentioned several times during

interviews and observation sessions related to those in the organization's reliance on one another, as in the interview with Julia, an employee:

*It's just a community. It's not a job. It's not a punch the clock type of thing. It's just real life.*

Community is discussed within the same type of stakeholders and between stakeholder groups.

#### *Within Stakeholder Groups*

The community theme exists within each stakeholder group, and all stakeholders help other members of their group work toward the mission. I witnessed a lot of the community knowledge sharing aspect through my observation of employees at inter-functional meetings. Employees in the organization attend structured meetings where they interact with other employees and share information with one another. Julia explained her experience attending these meetings:

*..... we just sit and learn about anything new, upcoming events, changes, just communication on whatever is going on. That was a neat chance to also be able to know all of the other teachers because if you were [in a particular position] you didn't work in other [facilities]. So, this gave you a chance to know all of the other [people in your same position], all of the others by name, and that you could also even know their names so that you could help out in any situation.*

I also observed the volunteers helping each other and sharing knowledge. Additionally, Margie, a volunteer, discussed the social opportunities available for volunteers in different departments to meet one another:

*We have a Christmas potluck every year where all of the volunteers are invited to bring a dish, and we have a little Christmas party here at this building in the hall. And then we just have our volunteer luncheon over at the [other] hall and that's where all of the volunteers, not just [this department's] volunteers but everyone that volunteers on campus comes for a luncheon and they have a...they designate a volunteer of the year.....*



### *Between Stakeholder Groups*

Jens, the board proxy, explains in the following how the organization is unique in the lack of barriers between stakeholder groups:

*... it allows complete transparency between the stakeholders in the organization. Occasionally it's happened many times over 20 years or so a [board member] will call you or the [Executive Director]. It might be me or it might be a program director and say "What's this? I hear this in the community." So, there's a freedom to call, to take, to take action if you're a [board member].*

There are many opportunities for stakeholders to communicate and work with one another to accomplish things for the mission. The board members frequently contact employees in the organization to learn more about specific programs in order to inform policy or activities discussed around these programs. Jens discussed scheduled social opportunities for board members and employees to interact and for board members to observe the organization's programs in action:

*... when they [board members] come here or when they go to a site, they're not only meeting the kids but they're seeing staff all over the place and are formally involved with the staff and asking questions.... In addition to that we have dinners and sometimes special events where the board members come in specifically with an opportunity to meet staff and talk to staff.*

Board members are better able to communicate the organization's mission by witnessing the associated activities and sometimes even seeing direct outcomes of the organization's work by talking to the children and families the organization serves. Employees are additionally able to participate in the nomination of board members. According to one document, employees are encouraged to submit nominations for potential board members based on whom they feel would be good candidates for guiding the organization in this role. One strategic policy statement for the board uses the phrase, "*we are a family*" in the document.

Volunteers and employees frequently interact as volunteers' time and knowledge are often times critical to the functioning of specific departments as they interact with the public and with board members. One employee, Paul, commented on the contributions volunteers make in regard to the organization:

*You know, volunteers are very important as far as the quality and care that we can give the children. You know, that's...that's a key factor. So, in other words, by having someone at that desk you know this morning, I was able to staff less people, which, in turn, saves money for the children. I just bought a kid breakfast, lunch, and dinner for the day.*

### *Sub-theme 3: Mission Connectedness*

The stakeholders' sense of community and involvement is centered around their collective connection to the mission. This mission connectedness was apparent in most data collection opportunities, and there were very passionate examples of those who knew about, and were connected to, the mission of the organization many years prior to involvement as a stakeholder. Emily, a volunteer, discussed her knowledge of the mission of the organization prior to her volunteer work:

*I started volunteering because I lived close to the organization but I knew of and heard about the organization just from living [in the same city]. I have used one of the organization's services every week [even] before I started volunteering.*

Furthermore, Jens has experienced that the board members choosing to serve the organization do so because of a natural affinity toward the organization's mission:

*... They have a sense for what the mission is. So, the vast evidence of that is that several years ago we actually...this was prior to 1996...board members met to try to define in a very short few words what is it that separates, or let's say what is the most salient factor in attracting someone to the board. You could think of it as*

*the marketing approach. What is it that we...who do we seek out, who do we target of this vast number of people who potentially might be interested. And we carefully looked into that and I guess to try to describe it, if I had the information here in front of me I could...I could do a much better job, but in the course of this, we looked at two individuals, both of whom are CEOs of major national corporations and one corporation had a connection in an indirect way, but direct enough to youth. In other words they were selling or advancing a product that was connected to youth. The other individual was head of a corporation whose products, a multiplicity of products, were not connected to youth. They were, only in the most oblique fashion. Okay. Yet that was the individual who was interested. Why? Because they had, and these are the key words, a natural affinity. That's what we came up with as our words to describe it. What is a natural affinity? A natural affinity for us is the individual who had members of his family or who had friends who had children or adolescents who are having difficulty.*

The stakeholders' connection to the mission centered around wanting to make a difference in the lives of children and families, wanting to help others reconnect to the organization, and seeing an improvement in those the organization serves. As Janine noted, it takes someone who is able to work well with others and care about the people he or she is serving.

*I can tell you that everybody out in [the department], you don't stick with a job like this if you don't care about kids and families. I mean it's not fun necessarily. I mean it's kind of one of those you gotta have a good personality and be able to get along with others. You can't train that, you know. It's a different...it's a different kind of skill, but you just have to be able to care and be concerned.*

Margie, a volunteer, talked about how her connection to the mission is accomplished through helping others reconnect:

*I like working in the [specific] department because the people that have passed through here will come back, and they ask for photographs, and they ask...you know, they have their stories that they tell and that they like to share, you know. ... then when they say "Do you have a photograph of this [group] or this activity or something?" and I'll say, "Sure, let me go look." I'm sure we have something, and I'll go into the files and...and I'll get out photographs and here there'll be something and they'll be so excited and so... Oh, it's just, it's a good, good thing when they see it. It...it helps them reconnect, I think.*

Even those who were not overly passionate prior to serving in the organization, said that if you knew nothing about the mission before coming to the organization, it did not take long before you became connected through seeing the results from various programs. Paul, an employee, shared these words of wisdom he gives to new employees to relay the mission connectedness inherent in order to be successful in the organization:

*I tell all of our new employees because I get to meet every one of them that come here....I'll take them on like a 20 to 30 minute tour, and it's the part of my job I like because not too many people get to meet everybody coming in our organization and have an impact on them. What I do though is...what I tell them is...you know, kind of what I said when we first started talking, you know -- what makes [the organization] a great place to work is for one reason you're coming here for whatever reason, but you're here to help kids and you get to do that on a day to day basis and the people that really make it here, I tell them, are the people that basically give more than you take. It's kind of the culture here. It's a tough culture to work in because they expect a lot out of you. They really do and you just gotta be one of those people that give more than they take.*

Paul also discussed his philosophy of how he makes decisions toward the mission, even though, in his role, he is not working directly with the children and families served by the organization:

*... it kind of goes back to when you make decisions when you work for an organization like this is that every decision's gotta be, you know, "Okay, how does this...how does this help children or...or does it?" And that's kind of the basis of my philosophy and how I decide how I'm gonna approach my day and the decisions I'm gonna make. [1] How does it affect the kids? [2] Is this in conjunction with our mission? and [3] Would [the founder] probably approve? Those are kind of my three tiers per se.*

Most of the departments ensure mission connectedness by using the organizational values and integrating them into their own departmental activities, including procedures and meetings. One department specifically took the overall organization's list of five values and further expanded it to how each of these values

are defined and should be applied in the department. While observing a monthly meeting of this department, I discovered that an ongoing agenda item is “Value of the Month” where the employees discussed what they did during the month to contribute to a particular value. They referenced not only the specific value, but also the organization’s mission statement in directly applying their work to it.

### *Summary*

Utilizing the results of the thematic analysis, the case study report follows. Some quotes used to demonstrate thematic richness are also necessary to use in the case study because they are pertinent to illustrating the results of the research as guided by the research questions. Although the initial categories determined in the case study outline as part of the research protocol are maintained (see Appendix C), it was necessary to present the organizational context first and interweave the discussion of observations and elements studied in-depth into the rest of the outline to achieve a richer narrative flow. Additionally, the research outcomes and interpretations were blended with the rest of the report and as, Lincoln and Guba (1985) recommend, my reflections and experiences are shared throughout this report as well.

## **CHAPTER 5. CASE REPORT DISCUSSION AND EMERGENT INSIGHTS**

The purpose of the study was to explore how knowledge is managed within a large nonprofit human services organization and how this knowledge is valued within the organization. The research focuses on the place that knowledge management, specifically knowledge cultivating and knowledge enabling processes, have in a nonprofit organization, a mission-driven entity. The case report discussion and insights were guided by the following research questions (informed by my thematic analysis results as shown earlier in Figure 8):

- (1) What knowledge cultivation and knowledge enabling processes exist within a nonprofit human services organization and how do these processes contribute to mission achievement?
- (2) To what extent does a nonprofit human services organization depend on a combination of explicit and/or tacit knowledge to achieve its mission?
- (3) What contributions do stakeholders (employees, board members, and volunteers) of a nonprofit human services organization make to the knowledge cultivation and knowledge enabling processes in order to achieve the organizational mission?

Taking direction from Lincoln and Guba (1985), I describe the organizational context to give the reader insight into the organization under study and organize the remainder of the report around my research questions. Additionally, I incorporate my reflections and experiences with the research throughout this chapter (Lincoln & Guba, 1988).

*Organizational Context and Overarching Observations*

This organization has been around for almost 100 years and is dedicated to serving children and families throughout the world. It is a large organization and, as such, has a large endowment, number of employees, volunteers, and board members and, additionally, has diversity in its service offerings.

It is an entity rich in data with a strong learning culture, facilitated by leadership in the organization that is supportive of learning and cultivating knowledge. Whether intentional or not, the organization has evolved into what Aliaga (2001) termed a Knowledge Organization: an organization that generates, transforms, manages, uses, and transfers knowledge in alignment with the goals of the organization. This is accomplished in this organization through the long-standing history of knowledge practices and the organization's openness to continuing to generate and share knowledge. The organization promotes and rewards open knowledge sharing, consistent with Mitstifer's work (2000b), by cultivating an environment where (a) making and learning from mistakes is respected, (b) collaboration is expected, and (c) asking for help from other departments in accomplishing tasks is required.

Upon initial conversations with the organization's gatekeeper, I confirmed that the goals of my research seemed to perfectly parallel the goals of the organization in exploring its learning and knowledge sharing practices in greater detail. It became readily apparent to me, as I started my initial research at this institution, that the art of learning and knowledge sharing is something this organization greatly values. This value is evidenced by the fact that the gatekeeper and other executives were

very receptive to my dissertation topic and wanted to learn from the results of my study.

Often times I was overwhelmed by the amount of passion exhibited by the stakeholders and sometimes even had to control my emotions as participants shared stories with me about their experiences working toward the organization's mission. They told me about children and families who were able to live better lives because of the work of this organization, and I truly felt that every stakeholder I interacted with believed that through their and others' work in the organization they were able to change the lives of others. It was amazing to me that even those stakeholders who did not come directly in contact with children and families did not dismiss their work as unimportant; rather, they saw how they were able to impact others through saving money as a result of operating decisions, talking to others in the organization, or increasing external awareness about the organization.

Also, I was impressed with the collaboration and communication that occurred and with the great deal of interest the stakeholders had in what I was learning as a result of my data collection and analysis. I also noted that, when I was attending meetings or training classes, knowledge about management practices and child and family issues was transferred to me as an observer. I have applied that knowledge to my own personal and professional life.

I have been acquainted with the organization for over 30 years, but I was introduced to the gatekeeper by a colleague to begin my initial exploration into this organization. As a wife and mother of two boys (in addition to being a family and consumer scientist), I was very interested in the organization's mission of helping



children and families, and was eager to see how it accomplished this mission through valuing and sharing knowledge. Quite unexpectedly, during the course of the research, and because of what I learned about the organization, I utilized one of the organization's services for assistance with a family issue, and I witnessed first-hand the impact its mission has, as my own situation was improved because of the organization.

I witnessed a lot of tradition inherent in the organization's tacit knowledge cultivation practices, which filtered into organizational practices, as well. Often, the manner in which things were done in the organization was based on what the founder of the organization initially intended. It was interesting to see that some practices initiated many years ago still continue on today, not in a "we've always done it that way" manner but more out of a respect for the history of the organization and a history of the impact the organization has had on children's and families' lives through its mission. I could not help but become overwhelmed by the passion exhibited by the stakeholders I interviewed and observed. Many of the employees and volunteers were impressed with the organization from a young age and wanted to make a difference by working in this organization, like Julia, an employee:

*First off, what drew me [to the organization] was a field trip when I was in fifth grade for my elementary school. I went to a public elementary school and we always went to the zoo and other field trips so the [organization] trip was the most exciting to see the whole campus. I grew up 30 miles away from here and had always driven by it down [Main] Street, but never really understood or knew what it was. So to take a tour and see the whole campus was very neat, and I thought that would be some place I might like to go some day and my mother explained to me it wasn't a place I needed to go. It was a place where children needed [help]. And so I thought as I got older it might be some place I would like to work because I got my education degree but I was trying to decide whether or not I would go to grad school and move on and a position opened up at [the organization] and I researched through the Web*

*site and drove around the campus and just had a very good feeling so I applied for it, interviewed, met a very lovely person who I ended up working under for a year and half and it was just a fit right off the bat.*

Others, even though they were not initially drawn to the organization's mission, quickly learned that it is more than just a job. As Paul, an employee, stated during an interview:

*People come to [the organization] for different reasons. You know, some people come for more money. Some people come because they want to help kids- all kinds of different reasons and stuff. Some...some really might believe in a mission. Other people might know nothing about it or what we do. But...but the people that, from what I learn, that stay and...and really make a difference are the people that kind of start believing in what we do and in our model of care, and that truly everybody in our organization is here for one reason and one reason only and that's to help kids get better. And there's a lot of good side effects for that type of work.*

The work of the organization in achieving its mission through tacit knowledge management will be discussed using my research questions to guide the discourse. The first question focused on knowledge cultivation and knowledge enabling processes.

#### *Knowledge Cultivation and Knowledge Enabling Processes and Their Contribution to Mission Achievement*

As was described in an earlier chapter, knowledge cultivation focuses on the leadership's role of organizations in nurturing knowledge in organizations (Skyrme, 1997). Knowledge enablement focuses on the realization that the individuality of human knowledge is responsible for shaping the organization and its environment, which leads to a reliance on the development of tacit knowledge (Gelepithis & Parillon, 2002). The organization has several knowledge cultivating and enabling processes, with "process" defined as a systematic series of actions directed to some

end; the end in this case, achieving the mission of the organization. In the knowledge cultivation and enabling sense, the actions or activities are not so much systematic as they are consistent, embedded practices that have evolved in the organization. Upon starting my research in the organization, it became quite clear that knowledge enabling processes and culture are at the heart of accomplishing the organization's mission. This cultural dominance in influencing knowledge sharing between individuals is consistent with Ipe's (2003) work, where she found the culture of the work environment to have the largest influence over three other factors: (a) the nature of knowledge, whether tacit or explicit; (b) the motivation to share knowledge, based on external and internal factors; and (c) the opportunity to share knowledge, including both formal and informal opportunities.

Due to the readily changing environment of working with children and families and the skills and knowledge required to ensure consistency and high quality in this environment, sharing, cultivating, and enabling knowledge around what the stakeholders do are tantamount to mission achievement. These processes include trainings, meetings, a leadership development program, and the use of constructive feedback. Each is discussed in the following sections, informed by the themes of "relying on experiences," "organizational strategy aligned with knowledge sharing implementation," and "stakeholders as community members."

### *Training*

In terms of achieving its mission, the organization utilizes training extensively, especially with those who have the most frequent contact with the children and

families that the organization serves. Pre-service and other types of training are continually used in the organization.

### *Pre-service Training*

Pre-service training is the most prevalent type of training I experienced, which is consistent with what Danesis and Zeiger (2007) found. They contend that service-level training is more important in the nonprofit sector than for-profit sector due to the interaction amongst volunteers, external clients, employees, and the general public.

There is a two week pre-service training course for new employees in the organization and as a refresher. This course is also used for those moving into new positions. Employees are grouped into training classes by the type of work they will be doing so that they have the opportunity to get to know others in similar positions. In the training center building, there are pictures all over the walls of people working with children and families. There are also historical pictures of the founder and other leaders with children and families and a large quote outside the doors to the training room from the Executive Director about how training will contribute to the organization's mission and help families. Refreshments are available outside the room, and people gathered here before the sessions to discuss what they had been reading in the training manuals or to continue discussions from the previous day's training activities.

The training room itself had posters on the walls with the organization's mission and vision, and various charts explained the organization's model and continuum of care. When I observed, the room was arranged with long tables and name tents, and about 55 total trainees were in the sessions that I attended. New

employees were given a 300+ page training manual, which was more like a textbook that contained all of the skills and presentation content explained in greater detail.

The trainers passed along information gained from their experiences working in various roles in the organization. The environment of the training classes allowed the participants to share with one another what they are doing through best practices and experiences gained internally and externally to the organization. Danesis and Zeiger (2007) found that best practices within the organization as well as those external to the organization are critical in order to continually update the operational outlook for the organization. I observed many veteran employees weighing in on various issues to give examples of what kinds of situations came up during the course of their work and how they handled these situations.

One very useful practice that I saw during the pre-service training was role playing. It was informative to watch experienced employees in the organization portraying the role of a child asking permission to do something and the trainee responding and reacting to the “child’s” request. The trainers read the role plays out of a book used by all trainees, and the book contained several scenarios based on best practices that actually occur in the organization. Additionally, the organization recorded recreations of interactions in dealing with their family clients, children, and also with external certifying professionals. The role plays were a great mechanism for more experienced employees to share, through their actions in the role play, actual situations that they have experienced. These experiences are passed on to newer employees who will do the same in the future by using the scenarios presented in the book adding their own flair based the actions of children with whom

they have worked. Videos of the role plays, using veteran employees and children, were posted on the training Web site for review purposes. Julia, one employee, discussed her experience with being a trainee in doing the role plays:

*Some [employees performing role plays] had, I think, when I practiced with them had been there over 15 years at that time. So, she would play the role of the youth and maybe test boundaries so I would get a chance to really practice it before I even went in the [site]. So, I wasn't seeing it first hand with the youth who were trying to push the limit... I was getting a taste of it and got to practice it before I even stepped in the [site]. And then I could turn around and play a youth. They could say "Here's the situation" and then she would show this is another way to handle it and we practiced those role plays all throughout those two weeks.*

*It was a good time. It was the best learning opportunity. I think I would have been nervous to go into the [site] at my age and not having formal training experience in that area, just having life experience.*

While the employee pre-service training was very formal, the pre-service training for volunteers and board members was progressively less formal. Not every department containing volunteers had a structured pre-service training. But I was able to observe a one-on-one training session with a new volunteer in a particular area. In this observation, the volunteer coordinator, Milt (a pseudonym), showed the volunteer the procedure for signing in every time she arrived and showed the volunteer examples from one of the binders she would be using to work with each child. Milt also gave her suggestions to share with the child about why she was doing what she was doing career-wise and also to share why she was volunteering at the organization. He said this information helped the children understand that people are giving of their time, and hopefully socialized them to want to do the same one day when they are in positions to help others.

He also told the volunteer to use the binder on each child as a way to refer to what things to work on with him or her so that other volunteers could learn from her experiences with the child, and create continuity. Milt gave her a specific example of how to handle a situation where a child is being manipulative or trying to get out of doing work and told her a story about a situation he had dealt with before. He shared specific examples of lessons learned for him like, how children had told him that they knew how to do something but did not demonstrate it, and how he found out that they really did not know how to do it. He told the volunteer to make sure that the child shows her how to do a specific academic assignment. Bruce also gave an example of what he does with the kids and what some of the rules are, and included a lot of best practices for discipline issues and how to engage the children.

The board member training was more of an ongoing orientation utilizing a 50 item checklist. The activities on the checklist were usually coordinated by the Executive Director or Board Secretary. One such activity was where the board member received an invitation to observe the organization's activities in progress and actually talk to some of the children the organization serves. Jens, the board member proxy, stated the following about the board orientation process:

*The orientation process...it's not particularly explicit, but there are a couple of factors that I guess I can talk about that will be helpful for you. One, we know that when they, a new trustee, begins or if they're considering joining as a board member, that the number one consideration is for them to meet kids, see kids, see the program in operation. A highlight of the orientation process I'm sure for the trustees no matter where they come from, no matter what station in life they have, is having dinner at one of our [sites]. So they go in the [sites] for dinner and they meet kids, talk to kids, hear from kids, see the program in operation and typically no one from the executive staff is with them. They're on their own experiencing that interaction by themselves, and it is a very rewarding one for the trustees.*

### *Other Training*

In addition to the pre-service training, there are dozens of well-coordinated training courses going on during the week for continual training related to specific skills needed by the stakeholders, such as those pertaining to the development of management skills or content specifically related to doing their jobs. Many versions of the training courses are also available on the organization's training site. The training site included several useful links to external collaborative opportunities, videos of role plays, and formal training courses. Videos of speakers were stored here as well, as a useful review tool to refresh what was learned, specifically in formal training.

### *Meetings*

The meetings I observed and read about in the organization were very productive as a means of knowledge cultivation and enablement. One such meeting was a weekly community meeting where knowledge was shared among approximately 50 people working in various areas of the organization. I attended this meeting in a large auditorium with the director of the group leading the meeting at the front of the room. Before the meeting began, everyone came in and talked with one another about things going on with specific children, birthdays, and problematic situations. Agendas and PowerPoint slides were distributed at this meeting as a guide for the topics to be discussed.

At the beginning of the meeting, when the director announced my presence and my research topic, she made the comment that I should not have any problems



seeing how knowledge and information are shared in this organization. Everyone laughed and nodded in agreement at what was blatantly obvious to them, but still being discovered by this outsider to the organization. During the meeting, general announcements were made about upcoming social activities and assistance needed in other parts of the organization, and brainstorming and rich discussions occurred about how specific initiatives were to be executed. The director discussed a new program that related to a specific strategic plan initiative and how it impacted each role in the organization. There was discussion around this topic and a lot of questions were raised, which the director said she would need to get clarification on and would report back on at the next meeting.

Through reading the board meeting minutes, and talking to the board proxy, I was also able to see that the board meetings were abundant with knowledge cultivation and enablement, with the board members utilizing each others' and employees' expertise and tacit knowledge. Every meeting had guests from various departments giving updates and answering questions on the programs.

One employee, Janine, commented on how meetings are viewed in her department:

*The administrative staff has a staff meeting every week. And we...that's when we really sit down and share all our information.*

### *Leadership Development Program*

In the context of providing a strong leadership culture within a knowledge organization, the organization concerned itself with fostering the development of

mindful and knowledgeable future leaders in the organization. As a result, the organization created a leadership development, or administrative trainee, program in 2004. There is an entire department dedicated to this program, with a director to oversee the learning of high potential individuals who are selected by their managers to participate in the program, which lasts from six to nine months. The goal of the program is to build “bench strength” in having well prepared future leaders ready to take on management roles in the organization with organizational knowledge and experience to help grow the mission.

I observed several of these administrative trainees. In every meeting I attended, there was at least one individual there from the program that was participating and asking questions. Additionally, administrative trainees facilitated role plays during the employee pre-service training sessions, and others presented sections of the training curriculum to the trainees. They were a confident group of individuals who were gaining public speaking experience, training experience, and the ability to interact with individuals throughout the organization to increase their knowledge base. As part of the program, individualized learning plans were developed and evaluated for the participants’ development of learning competencies. Development opportunities were created to allow them to work in parts of the organization where they did not yet have experience.

The trainees were scheduled on a rotation to work in the areas that they had the biggest need to learn, based on their previous experience in the organization. Additionally, knowledge area assessments were conducted throughout the nine-month program to determine competencies that have been achieved and those that

were still required. The individuals in the leadership development program did more than facilitate their learning. By their involvement in so many different departments and activities, they served as a conduit for transferring knowledge from one department to the next through their involvement. As part of the leadership development program, a formal mentoring component was very recently initiated, according to Raefe:

*The mentoring program that they're doing with our administrative trainees is more as a management leadership mentoring program that we hook them up with one of our better leaders and let them get assignments, shadow, discuss why things were done the way they were done, answer questions, target it to their goals, find out where it is they're going after they leave the training program and then try to relate it to where they're headed.*

#### *Use of Constructive Feedback*

Although, in some organizations “feedback” is a word that is quite commonly heard, feedback is commonly used in this organization. The use of feedback is deeply embraced and is integral to this organization’s knowledge cultivation and enablement, leading to furthering the mission. A respect for feedback is taught to the organization’s stakeholders and embraced in the culture as a way of improving the quality of care and achieving the mission. In addition to using feedback between stakeholders for organizational development purposes, it has a second purpose in that it is used as a service strategy so that stakeholders utilize this same feedback mechanism in working with its clients and giving feedback to them.

Raefe provided an example of the impact that using feedback has on the organization:

*Here we try to embrace feedback because the only way to help us improve is with feedback. And you know it comes and goes but sometimes feedback can be perceived as a threat and sometimes it can be seen as helpful. And what we try to do as a management, as a culture, maybe, and within the organization is make feedback helpful, so that even if it's critical feedback, it's presented in a way that is helpful to improve the performance of people at [the organization]. And any time we talk about giving feedback or any time we talk about doing an analysis of something the design is to help every employee at [the organization].*

Julia, an employee, discussed her experience with receiving feedback in her role to help her improve how she works with children:

*...we would do feedback every single night...critique, and I would always ask for what I could do better. Or if they [supervisors] weren't present for a situation to overhear me, I would play it back to them, and say "Here's what I did. Here's what the child did. You know, how would you have done that differently?"*

The board members use feedback extensively, particularly utilizing self-evaluation mechanisms to examine how they and other board members are helping to achieve the mission, as Jens discussed.

*And in fact one of these goals in here, if I may say, really gets to that [question]. "How satisfied are you that your fellow trustees take advantage of opportunities to enhance the organization's public image by periodically speaking to opinion leaders and others about the work of the organization?" And mostly what they [the board] come to us with are practical terms, issues that we need to address better. In other words, we're not meeting the information needs of people out there and they're sensing that "Hey, I think we need to explain this a little better because people don't quite understand it in my opinion."*

Feedback is used as a critical assessment tool and as a way for others to learn about the best ways to do things in the organization and how they can improve how they are accomplishing the mission. Feedback is also built into the formal training opportunities, especially in the role plays. For example, one veteran employee would play the role of a child and another employee would make notes and give feedback after the trainee was finished acting out this scenario.

Undoubtedly, in this organization, the knowledge enabling and cultivating processes focus on the use of tacit knowledge. The next section further defines the organization's reliance, and dependence on explicit and tacit knowledge and how these work in conjunction with each other to achieve the mission.

*Extent to Which Organization Depends on a Combination of Explicit and/or Tacit Knowledge to Achieve its Mission*

Utilizing the themes of “relying on experiences,” “organizational strategy aligned with knowledge sharing implementation,” and “stakeholders as community members,” I was able to see that clearly this organization achieves its mission through its application and cultivation of tacit knowledge. The results illustrated will hopefully contribute to enriching the literature with regard to how tacit knowledge is applied within a nonprofit human services organization, where McAdam et al. (2007) cited a deficiency. Additionally, the major finding is that this organization has established explicit knowledge materials that guide tacit knowledge development, and vice versa. Although creativity and tacit knowledge are abundant, the organization utilizes several internally published explicit documents available in hard copy and on the intranet, especially its strategic plan and weekly newsletter, to ground this creativity and direct it toward the mission development and achievement of the organization. Furthermore, the aforementioned artifacts, posters, pictures, videos, and other explicit, non-document forms of knowledge help guide the tacit knowledge cultivation and enablement by (a) serving as a constant reminder of what has occurred in the organization over the last several years and (b) ensuring that

everyone understands the mission of the organization, enabling future proofing for achievement of the mission. “Future proofing” is defined by the International Federation for Home Economics (2008) as “anticipating future developments to minimize negative impacts and optimize opportunities” (p. 7).

Stakeholders rely heavily on experiences in the organization, but utilize policies and procedures to capture these experiences, best practices, expertise, and lessons learned as best they can. Freeze and Kulkarni (2007) classified a framework of five knowledge capabilities existing within an organization with explicit and tacit components: (a) expertise; (b) knowledge documents; (c) lessons learned; (d) policies and procedures; and (e) data (the model used to develop the data collection instruments for this study). I found the organization to be vastly dependent on tacit knowledge sharing with regard to expertise, specifically collaboration and mentoring, and with a unique way of communicating stories as a way to share experiences about the mission. The explicit forms of knowledge within the organization include knowledge documents, data, and policies and procedures to strengthen and support this tacit knowledge sharing. The next sections further discuss the following as they relate to this explicit and tacit knowledge dependence: sharing experiences through storytelling, collaboration, mentoring, and explicit material supporting tacit knowledge.

### *Sharing Experiences through Storytelling*

Tacit knowledge sharing is second nature in this organization, and, because it has such a learning culture, its stakeholders are expected to share this knowledge.

Tacit knowledge sharing is accomplished through the sharing of experiences, which are communicated through mechanisms such as storytelling. This rich tradition of passing on stories stems from a long history of the organization's first employees, including the founder, sharing stories about why the organization was started and the reasons behind decisions that were made in the organization toward furthering the mission. All of the documents I viewed, which were published for internal or external use told stories about the families and children that the organization has helped, with a picture and quotations next to the child saying how their lives were made fuller and better because of this organization. The stories have impact and are emotional and full of passion. I still remember a lot of the stories I read in my document review and heard from the stakeholders. They evoked emotion, similar to what Julia recounted with her experience of a story, which she passes on to others, about a visitor to the organization:

*Sometimes I'll say this one man told me as he walked out the door, "You know I bet [the founder] had no idea, you know, that this would ever become this and if anyone ever says that one man can't make a difference they should come here." He had a tear in his eye as he walked out the door. And it's stuff like that that happens to me every week when I'm there, and I just share those things with people who come in every weekend and it's just the neatest thing to meet people who...who want to learn about it or who were there and want to share it with other people.*

### *Collaboration*

According to Freeze and Kulkarni (2007), expertise is acquired through experience, formal education, and collaboration. Indeed, this organization recognizes and encourages collaboration as the main driver of expertise, and collaboration is part of the organization's stated values, as I saw on placards

throughout the organization, and is actively practiced both internally and externally. During one meeting I attended, every employee went around the room and gave his or her report. Then at the end of the report, they specifically stated that they needed extra assistance with performing an activity in their department because they were short handed or they needed someone with expertise in a particular area to help them with a particular project. This *assistance needed* portion of the report was a common practice. It was expected that they would ask for their colleagues' assistance, if it was needed. This aspect of dynamics inside the organization is quite a departure from the conventional "hoard information to gain power" mindset (see Gortner et al., 2007). Raefe, an employee, gave his perspective on collaboration in the organization to create win-win situations.

*I think from a collaboration, from a transferring of knowledge, they don't run hand in hand, but if you think of yourself as learning and transferring knowledge, it really is collaboration in many cases. And now I'm not one to say that you give away trade secrets, but collaboration to me is a win-win situation. It's not a win-lose situation. And in a win-win situation you get collaborative efforts. In a win-lose situation you get competitive efforts.*

Another employee, Chip, discussed internal collaboration with another department in the organization.

*So, we're doing a lot of corresponding back and forth on what the future's gonna be so everybody taps into everybody's knowledge here. You rely on one another. In different departments. I mean, you heavily rely upon each other no matter who you are. You have to have a good working relationship with those people. Organizations don't survive if there's, you know, if there's contempt among employees or the supervisors.*

The board members are also very collaborative with one another and as Jens, the board proxy, discussed, the governance structure of the organization contributes to this collaborative environment.



*This type of system is designed to help our various managers and experts work together to create new things instead of working apart to perfect established skills. It recognized the demands on management created by widely disbursed multiple sites.*

Collaboration occurs not only internally, but externally as well. I was able to watch videos of various speakers that have come into the organization to share their experiences and expertise with the organization and, in turn, learn from the organizational stakeholders. A lot of the documents I analyzed were stories on specific efforts to collaborate with other nonprofit or governmental organizations where employees worked together to improve things for children and families. Also, stakeholders in the organization knew when to collaborate with those outside of the organization to help in solving specific problems, as explained by Chip:

*There's no way you can just run it all from here. You have to have help because without [those collaborative relationships] there's just not enough hours in the day nor the knowledge. I mean there's no way you can keep up with all the changes so, we have our...we have our...our...good firms that once we work with them and find out how they are, we just refer back to them, and if there's something that they can't answer, they always know somebody else on down the line...*

My findings with regard to collaboration in this organization are in direct contrast to Gortner et al.'s (2007) work with nonprofit organizations. They found instances where people create “stovepipes” or “silos” due to the departmentalization of organizational knowledge. The organizations in Gortner and colleagues’ study developed specialized knowledge in service-specific departments at the expense of holistically understanding the overall organization’s processes and services. The organization in my study also had departments who possessed specialized knowledge, but they truly understood their departments’ contributions to the organization’s mission.

### *Mentoring*

Another collaborative form of tacit knowledge sharing in this organization is mentoring. The organization's use of mentoring is consistent with Gratton's (2004) view that tacit knowledge sharing is extremely important to some organizations and mentoring is a mechanism to accomplish this sharing. Although one formal mentoring program is being created for leadership trainees, there are many more examples of informal mentoring situations. In an organization where learning is so highly valued by mission-minded individuals, mentoring is a natural progression and outcome from many conversations and relationships. Janine discussed the concept of ongoing mentoring.

*I feel like I mentor all the time, and it's helping people look at things differently sometimes. The folks on the phone need to have an understanding of [the organization].*

Similarly, Raefe discussed his thoughts on how mentoring occurs naturally as part of the supervision process.

*If you remember what I said earlier that in order for there to be an effective mentoring program the mentor needs to teach and the mentee needs to learn or the mentor wants to teach and the mentee wants to learn. Okay. A lot of that happens in a supervision structure. If those two factors align, then you really are in that mode of learning. It creates a learning opportunity. And with that learning opportunity you also, if it in fact helps the mentee, the mentee feels good about it, the mentor feels, the mentor feels good about it. You get a strong relationship out of that. So, there are some informal structures of a supervisor/supervisee approach or that people on their own go and seek out advice from certain people, and I would say mentors should be mentees. And mentees should be mentors.*

### *Explicit Material Supporting Tacit Knowledge*

As stated earlier in this section, explicit knowledge is not heavily relied upon in the organization as an initial source of knowledge, but it is used as a mechanism

to share and document tacit knowledge. The organization's newsletter is used to record the stories and ensure that tacit knowledge is documented for consistency purposes in the organization, and the strategic plan is an explicit document that is used as a basis for consistency in drawing all organizational activities to the mission and strategy of the organization. As is intended for strategic plans, it truly is the anchor for this nonprofit human services organization. Other explicit knowledge that is important to the organization includes training manuals, external press clippings, artifacts, pictures, and diagrams, all of which help ground the tacit knowledge and convey the stories and history of the mission-focused organization. Examples of explicit knowledge use are further discussed in the ensuing sections.

#### *Organizational Newsletter*

The organizational newsletter is heavily used in the organization, and it is a compelling piece of literature, full of stakeholders' pictures, statistics related to mission-related outcomes, stories about children and families the organization has helped, classified advertisements for stakeholders to facilitate the buying and selling of personal items, updates on programs in various locations, and social event announcements. Although only one issue was analyzed as part of the data set for this research, I found myself looking forward to reading the latest newsletter every week, from an interest standpoint, to see what was happening in the organization. Every stakeholder I encountered in interviews and observations used this document to glean and share knowledge in the organization. During one employee meeting, several employees referred to consulting the weekly newsletter for updates as to the

organization's progress in relation to the strategic plan. Julia discussed her use of the internal newsletter to share with outsiders to the organization:

*In the [newsletter] and in the quarterly journal, they'll put in some stats and figures. Sometimes reports that they've done. It's different depending on the time of year. And that's where I get some of my other information too. That I just share with folks that are coming in and asking different questions.*

The newsletter comes out weekly, and is available in hard copy format and through the organization's intranet site. Because some of the volunteers and board members do not have access to the intranet, it is helpful that the different mediums are available so that everyone is informed of the happenings in the organization.

When asked what documents she referred to in her volunteer position, Margie stated the following about the internal newsletter:

*We have the...the [Newsletter]. That's the more current publication. I guess that's about it. I guess, as it you know, like in the [Newsletter] they'll...they'll put different statistics in and just as a an, oh, "that's good to know" type of thing, but not you know not for me to use solely in my...my little position, what I do here.*

When asked what she uses to learn about the organization, Cindy, another volunteer said:

*"Well we do read the...we usually do read the little newsletter that they have."*

### *Strategic Plan*

Next to the organization's mission statement, the strategic plan is the most commonly used explicit document in the organization and is critically important to achieving alignment with its knowledge enabling and cultivating environment.

Glasrud (2001) and Brown and Yoshioka (2003) recommended the use of mission statements as a tool in the strategic planning process to ground daily activities toward a common focus. The results for this nonprofit human services organization

intimate that the strategic plan is an even better grounding tool, serving as an extension of the mission statement, to truly align all organizational stakeholders toward a common focus. Strategic plans allow for the transference of articulated knowledge, as posited by Aliaga (2001) as part of his Knowledge Organization concept (2001). More importantly, it furthers the alignment of human capital with strategic goals and objectives, linking knowledge assets to work functions and processes (Andreou, Green & Stankosky, 2007).

Consistent with my research, the U.S. Department of Education (2004) also has stressed the importance of having human capital initiatives, such as knowledge cultivation and enablement, aligned with strategic goals. In the organization studied here, every stakeholder was familiar with the organization's strategic plan, especially the board members and employees. This plan is communicated in great detail to the stakeholders through meetings and in hard copy format, both when it was first rolled out, and then later, through updates communicated through the intranet site and internal newsletter. Paul, an employee, commented on his knowledge of the strategic plan:

*They're really working hard on communicating on...on our new strategic plan, which I know pretty much backwards and forwards up and down. I have to, you know.*

The organization recently went through its most current five-year strategic planning process to produce 11 strategic plan items. Even without looking at a copy of the strategic plan, after hearing so many employees discuss various initiatives, I felt like I knew all 11 elements of the plan. This strategic planning process allowed the organization to take its overarching mission and factor it down into a strategic

plan about how it planned to accomplish its mission. Raefe discussed his extensive use of the strategic plan to guide his work in the organization.

*I refer back to the strategic plan. I am responsible for initiative number four and am constantly keeping that up to date. I monthly review all of my staff, my direct reports, for those areas that I have, and they've gotten goals and objectives that they have and timelines they need to meet.*

My research of this organization builds on the work of Teng and Hawamdeh (2001), where the nonprofit organization they studied used knowledge management to align the organization's mission with best practices to determine the most efficient or cost-effective way of doing things. Best practices are a small part of achieving an organization's overall mission, but the strategic plan as a knowledge sharing tool achieves optimal alignment and focus by the organizational stakeholders. In about every meeting I observed and written documents that I read pertaining to meetings, the meeting attendees specifically referenced the plan as to why a certain project was being done. One excerpt from a document is as follows:

*As part of the [Organization] Strategic Plan, we are committed to expanding the evidence base of the [specific service].*

#### *Artifacts, Pictures, and Other Non-textual Knowledge Documents*

Artifacts are also used in the organization to combine explicit and tacit knowledge, and keep people connected to the mission. I saw several examples of books, clothing, furniture, and newspaper clippings from the organization's early beginnings that remind the stakeholders of the historical origins of the organization, as one employee, Chip, stated:

*There's so much history in our file cabinets right now that's some days you just get in there looking for something and you get so sidetracked reading about the history. It's just absolutely incredible.*

In addition to textual mediums of explicit knowledge, everywhere you turn in the organization there are pictures of the organization's founder and pictures of stakeholders interacting with children and families. These pictures serve as a constant reminder to the employees about why they are with the organization. Additionally, posters are hung on the walls with the organization's mission and diagrams of various organizational services.

The organization also relies on data from surveys and financial information to communicate explicit knowledge. For example, when the five-year strategic plan was initially created, it was communicated in great detail to the organizational stakeholders. Paul, an employee, reflected on the use of externally conducted survey results to communicate to all employees the rationale behind the strategic plan.

*Those [survey] results were...were told to us in different meetings and stuff like that through the administration. Every employee pretty much got to know what the results were because, quite frankly, they...they develop our strategic plan around it.*

Tacit knowledge and the explicit knowledge that complements and scaffolds it are utilized by all stakeholders in the organization as they work to achieve the mission. The specific contributions of each stakeholder group are discussed further in the next section.

*Contributions of Stakeholders to the Knowledge Cultivation and Knowledge Enabling Processes in Order to Achieve the Organizational Mission*

Both the “stakeholders as community members” and “relying on experiences” themes informed the final topic about stakeholder contributions. I experienced each stakeholder group having its own unique attributes and identities in its knowledge contributions to the organization. Additionally, I found that the stakeholders work together to share knowledge in order to achieve the organization’s mission. This unified leadership in the furthering of knowledge is supported by Skyrme’s (1997) work on the necessity of having leadership of knowledge at all levels of the organization. Using my “community” concept, I can parallel the work of Davenport (1999) and Gratton (2004) to see that this is an investment in a stakeholder’s personal human capital toward the common goal of the organization’s mission. In the following text, I discuss each stakeholder group individually as to the members’ contributions and then discuss their collective contribution to achieving the organizational mission.

*Employees*

Employees drive the knowledge cultivation processes mostly through the experiences they bring with them and pass along to others in the organization. The culture emphasizes the importance that those entering advanced positions in the organization must have previous organizational knowledge to be successful. As an example, some training positions in the organization require advanced internal knowledge in order to move into the position. The organization also supports the



promotion of internal leaders who possess a broad knowledge of the organization's activities.

Through their work, employees are the drivers and stewards of the organization's mission, as Paul, an employee, stated:

*People come to [the organization] for different reasons. You know, some people come for more money. Some people come because they want to help kids- all kinds of different reasons and stuff. Some...some really might believe in a mission. Other people might know nothing about it or what we do. But...but the people that, from what I learn, that stay and...and really make a difference are the people that kind of start believing in what we do and in our model of care, and that truly everybody in our organization is here for one reason and one reason only and that's to help kids get better. And there's a lot of good side effects for that type of work.*

Employees also bring their experiences, whether internal or external, to the organization, giving each of them a different perspective on how to do things in the organization, which will impact the mission. Raefe, an employee, recounted how he uses his external experience in the organization to help make changes for the better:

*So I was able to bring a different objective view of how things were being done. We were entering into a phase where at [the organization] where we kind of reached our maximum without converting to the normal application of services outside of [the organization] and it was harder and harder and harder to get kids because states were wanting to keep them closer to home. There was a push to get kids outside of [service area] and so what I was able to do was to bring perspectives from multiple states that I had either worked in or consulted with to bring that perspective to [the organization] to help us go to the next stage in our application of services.*

### *Volunteers*

One of the most interesting things found while reading my reflexive journal is that the volunteers I interviewed were very humble and did not see their roles as having an impact on the organization, where other stakeholders did see the value of

their own roles. Additionally, employees definitely value and see the contributions of the volunteers, as Paul one employee stated:

*You know, volunteers are very important as far as the quality and care that we can give the children. You know, that's...that's a key factor. So, in other words, by having someone at that desk you know this morning, I was able to staff less people, which, in turn, saves money for the children. I just bought a kid breakfast, lunch, and dinner for the day.*

Even if the volunteers do not 'see' the significance of their contributions to the organization, they felt deeply passionate about the organization itself and how good it made them feel to work there. I observed one volunteer during her pre-service training. As she was leaving, she said that she was so excited to be a part of this organization and could not wait to get started working with the children. It seems the volunteers valued their direct work with the children and families but did not see themselves as directly contributing to the operation of the organization, except to be guided and inspired by the organization's mission. The enthusiasm and passion that the volunteers bring to their work on behalf of the organization contributes to the further telling of stories and the sharing of tacit knowledge with those inside and outside the organization to make more people aware of the organization and its mission.

This passion is demonstrated from quotations by volunteers Margie and Emily:

*(Margie) Well I...I really enjoy coming over here and volunteering because I feel like, especially when the people come, the alumni they, you know, all of the boys and girls that have been here before and they come back and they...they just...it's so encouraging to see that they, it was a good thing for them, you know. And some of them get very emotional sometimes when they come back, and it just makes you feel good that it was...it was a good place for them when they were here and, you know, it gave them...it gave them the opportunity to become something*

*beyond what they could. Yeah, I don't know, just, I guess that's what the neatest thing is.*

*(Emily) Well, it makes me feel good to be volunteering out here. I've done a lot of volunteer work, but I have to say they really appreciate you here. I have volunteered at [other organizations] and they really appreciate you here. And it's just...it's fun to be around a lot of positive people. I just don't hear anything negative I mean about, really, about anything. I mean if things aren't going just right, I don't hear about it. I have in the past [in other organizations]. I have. And this one is probably one of the best I've ever volunteered where I could, maybe it's because it makes me feel so good.*

Another finding, another nuance to this aspect of volunteer work, is that the volunteers acknowledged their contributions to the mission, but downplayed the magnitude of these contributions. They believed in the mission a great deal and enjoy helping children (for those who work directly with them), and helping the organization. However, they tended to acknowledge the work of the employees more so than their own contributions, and did so by making comments as to the improvement they witnessed in other children, who they do not work with directly. Emily, a volunteer stated the following during our interview as it relates to her observations of the employees' work with the children:

*They [the employees] have done a good job with the children. The children are well-mannered; they shake your hand when they greet you. They have good manners and are friendly. The kids even know that this is a good place.*

Other specific contributions the volunteers make to the organization involve sharing their volunteer work and the mission with those outside of the organization, in the community, and potentially sharing their organizational knowledge to recruit other volunteers. This ambassadorial aspect of their work is invaluable to the achievement of the mission; yet, they did not see it as significant, just as an incidental part of their role. I interacted with mostly retirees and college students

who were volunteers in the organization. They had opportunities to share their work with others to entice them to volunteer themselves:

*(Emily) It comes up in conversation all of the time. Yeah. People who know that I volunteer here frequently ask me what I do...*

*(Margie) If someone asks, I tell them what I do in, like, here [in this department]. You know, I am always working on identifying and sorting and making sure the photos are all in the right files in the right order so that people can actually come in and find somebody and you know. And sometimes, like last week, I met a lady in the grocery store and told her I was...I had to go pick up this cake because we were having a birthday party for one of the volunteers over here and she says, "Oh, what do you do over there? I...I would be interested in volunteering" and so then I, told Helen, I said, well, I work in the [specific] department and they're always looking for volunteers if you're interested and so she actually did call [the director] last week and...and she's applied and...and hopefully will start working at...at one of the positions around here and the same with the [other department I work in]. People are always saying "Well, uh, well, what do you do over [there]? Well, we do, we do a lot of the reading. A lot of kids are quite far behind with their reading, and then the math, the math skills are the...the two...two subjects that we work on over there and they're always looking for [volunteers] and if you have time it's only an hour.*

### *Board Members*

The board members are a unique group in that they are volunteers, but they have the pivotal responsibility of guiding the organization and working with the executive director to formulate the organization's future direction as well. As is stated in board documents I reviewed, those sitting on the board agree to be committed to providing the highest quality services and playing a leadership role in defining, measuring, reporting, and improving the quality of care, along a continuum of care, that the organization provides. The board's stated responsibilities and subsequent actions are consistent with Fenton and Inglis' (2007) recommendations from a study of small nonprofit organizations

contending, “the board of directors and executive director both have vital roles in getting perspectives from all roles and levels in the organization before making decisions” (p. 346).

The board members have access to every employee (tacit knowledge) as well as publications and pieces of written material produced in the organization (explicit knowledge), to learn as much as they can about the organization and its mission. Additionally, they are not afraid to look critically into the organization and share knowledge to improve quality in the organization, and as Jens, the board proxy, stated:

*We don't need all the happy talk about “Oh you guys are loved.” You know what we really want to know how can we do better as we're looking ahead, not looking back. So, they do that and they do a very responsible job about that. They are not afraid. There's no inhibition talking about that or raising the question or saying “Can't we do a better job about X, Y, or Z?” [They communicate that] at the board meeting, typically, or at one of the committee meetings.*

The organization realizes the importance of having the board connected to the mission so that it is able to transfer knowledge to work toward this mission, as Jens said about board members' “natural affinity” toward the organization:

*... They have a sense for what the mission is. So, the vast evidence of that is that several years ago we actually...this was prior to 1996...board members met to try to define in a very short few words what is it that separates, or let's say what is the most salient factor in attracting someone to the board. You could think of it as the marketing approach. What is it that we...who do we seek out, who do we target of this vast number of people who potentially might be interested. And we carefully looked into that and I guess to try to describe it, if I had the information here in front of me I could...I could do a much better job, but in the course of this, we looked at two individuals, both of whom are CEOs of major national corporations and one corporation had a connection in an indirect way, but direct enough to youth. In other words they were selling or advancing a product that was connected to youth. The other individual was head of a corporation whose products, a multiplicity of products, were not connected to youth. They were, only in the most oblique fashion. Okay.*

*Yet that was the individual who was interested. Why? Because they had, and these are the key words, a natural affinity. That's what we came up with as our words to describe it. What is a natural affinity? A natural affinity for us is the individual who had members of his family or who had friends who had children or adolescents who are having difficulty.*

### *Collective Contributions*

A major finding from this study is that the largest contributions made by stakeholders in the organization are not as individual groups, but collectively, through their interaction with one another in functioning as a community and relying on each other's tacit knowledge. These findings build on Fenton and Inglis' (2007) work with regard to the three perspectives framework (employees, board members, volunteers) in determining organizational values. In this organization, the volunteers, board members, and employees have access to one another to improve the organization so it can achieve its mission. Volunteers and employees heavily and intentionally rely on each other to: (a) share knowledge about the interactions they have with the public, (b) share ideas about how things can be improved, (c) maintain the operations of the organization, and (d) serve more people through its mission. During many of my observation sessions or upon visits to the organization, I saw interactions between volunteers and employees to address specific questions or organizational processes. Julia, an employee, discusses her interactions with volunteers in her position:

*They [the volunteers] are helpful... We have volunteers who put the little sacks together with a ribbon on it and a little card that says something about being at [the organization]. And a lot of people like to purchase those as a keepsake.*

Another anomaly in this nonprofit human services organization is that the board members are also able, and expected, to interact with employees in the organization. This practice is quite different from the normal operational distance between board and staff. If a board member has a question about a specific program, he or she is able to contact the head of the program to ask that person a question leading to a better understanding on behalf of the board member so that he or she can make better decisions and also communicate the mission more effectively to those outside the organization. Jen explained this practice:

*... it allows complete transparency between the stakeholders in the organization. Occasionally it's happened many times over 20 years or so a [board member] will call you or the [Executive Director]. It might be me or it might be a program director and say "What's this? I hear this in the community." So, there's a freedom to call, to take, to take action if you're a [board member].*

There are even scheduled social opportunities for board members and employees to interact several times each year. A dinner party is planned where newer employees, more veteran employees, managers, and lower-level employees are invited along with board members to meet each other, talk, share stories, and dinner. Having this type of relational environment lends itself very well to knowledge sharing as well as establishing a comfort level for the employees to be able to contact the board members in the future, when they have questions, as Jen stated:

*... when they [board members] come here or when they go to a site, they're not only meeting the kids but they're seeing staff all over the place and are formally involved with the staff and asking questions... In addition to that we have dinners and sometimes special events where the board members come in specifically with an opportunity to meet staff and talk to staff.*

Board members are better able to communicate the organization's mission by witnessing associated activities and sometimes even seeing direct outcomes of the

organization's work by talking to the children and families the organization serves. Danesis and Zeiger (2007) elucidated the importance of these activities by stating that learning impact is greater in nonprofit organizations because of the immediate outcomes that can be observed with those the organization serves.

Additionally, employees are able to participate in the nomination of board members. According to one document, employees are encouraged to submit nominations for potential board members based on whom they feel would be good candidates for guiding the organization in this role, akin to the "natural affinity" notion mentioned earlier.

Although no formal activities are in place for the volunteers to interact with the board members, the board members walk across the organization's campus and are accessible to all of the organization's stakeholders. Chance encounters can lead to tacit knowledge sharing. Also, the board members may come into contact with a volunteer through the course of board meetings, tours, or other activities.

### *Findings*

The organization is very consistent in its tacit knowledge cultivation and enablement toward its mission, goals and overall strategy. A rich history and strong sense of culture contribute to the furtherance of the organizational founder's goals and this is accomplished through the stakeholders' knowledge sharing. The stakeholders are open to and expected to share knowledge with one another, and stakeholders record much of the tacit knowledge they have developed through their expertise and lessons learned to have a consistent message within the organization.



Knowledge enabling and cultivating practices are key drivers of human capital value in this organization, and true to the nature of enablement and cultivation, these practices have allowed tacit knowledge to evolve in a non-controlling, non-formalized way as Skyrme (1997) discussed in his work. Additionally, focusing on the mission of the organization serves as a non-controlling yet consistent driver for knowledge enablement and cultivation.

Some elements of Liebowitz's (1999) for-profit framework for successful tacit knowledge management also translate to this nonprofit human services organization. Liebowitz's factors include the following: (a) a strategy for knowledge management with support from senior management; (b) a knowledge officer and knowledge management infrastructure; (c) knowledge ontologies and repositories; (d) knowledge management information systems, software, and tools; (e) incentives to encourage knowledge sharing; and (f) a supportive culture of both formal and informal knowledge sharing methods.

This nonprofit organization's strategy for knowledge management is guided by the strategic plan, which is based on the organizational mission. Although no knowledge officer or infrastructure exists, there are multiple stewards guiding the development of the knowledge. Knowledge ontologies are a necessary part of the tacit knowledge sharing process in this organization so that all stakeholders understand what is meant by specific terms and ways of viewing things in the organization. Common language for practices, such as "feedback" and "mentoring," and "collaborating" is necessary to ensure cohesiveness, and while knowledge management information systems do not exist in the organization, they can be

developed in the form of communities of practice or knowledge repositories to capture the tacit knowledge that is being shared naturally. Motivation to share tacit knowledge is abundant in this organization, but further incentives can be developed to encourage practices leading to more tacit knowledge sharing. Current incentives in this human services organization are in the form of the satisfaction in knowing that knowledge sharing is leading to helping children and families. A supportive culture in terms of knowledge sharing methods is evidenced by the organization's encouragement of its stakeholders to try new things, explore other ways of doing things, and to make mistakes and learn from these mistakes.

Another finding is that all stakeholders should be able to see the value of their knowledge and work in achieving the mission. In this study, the volunteers were appreciative of the mission and other stakeholders' work toward achieving it but did not value their work as much as they did others'. The major contribution of the volunteers is their furtherance of storytelling and sharing of the organization's mission with those inside and outside of the organization to increase awareness. The volunteers acknowledged their work with children and families but downplayed the magnitude of their ambassadorial contributions to their furtherance of the mission.

All stakeholders in the organization use a combination of tacit and explicit knowledge. The dependence between the two forms of knowledge is noteworthy. Tacit knowledge is clearly the driver of knowledge in the organization, particularly with the organization's emphasis on collaboration to build expertise. As a natural progression of this collaboration, mentoring relationships are in abundance as they

facilitate the sharing of knowledge among mission-minded individuals. Explicit knowledge is not heavily relied upon as a primary source of knowledge, but is used as a mechanism to document and share tacit knowledge in this organization. The strategic plan and organizational newsletter are the most common forms of explicit knowledge in addition to artifacts and pictures. The explicit knowledge documents help reinforce the knowledge and record it in order for others to benefit and to ensure that it is consistently transferred to everyone in the organization.

Another finding is the use of the organization's strategic plan in aligning the mission, knowledge practices, and daily stakeholder activities. The strategic plan is the most commonly used explicit document next to the mission statement, is a powerful tool in fostering transparent communication between all stakeholders in cultivating and enabling knowledge toward mission achievement by providing a consistent framework to turn the mission of the organization into specific, tangible initiatives.

Finally, one of the most compelling things found in the research is the stakeholders functioning as a community in their enablement and cultivation of knowledge toward the organization's mission. The stakeholder community represents an investment by each stakeholder in his or her personal human capital toward the mission. Although each stakeholder group has its own unique attributes and identities, greater outcomes in terms of knowledge sharing toward mission achievement can occur when the mission becomes the focus as opposed to knowledge being kept within specific stakeholder groups or specific departments. The organization has encouraged this mission focus by enabling the reliance of each

stakeholder group on the other. There is a comfort level on the part of employees, volunteers, and board members in becoming leaders in the sharing of knowledge with one another. Board members think critically about improving the quality of the organization's services and share knowledge in order to do so. They contact employees to learn about specific program functions and outcomes so they have a better understanding to communicate this with outsiders to the organization. This is an example of the unified knowledge leadership, supported by Skyrme's (1997) work, surrounding the necessity to have knowledge cultivation at all levels of the organization.

Based on findings above, I present a conceptual framework (illustrated in Figure 10) as to how this nonprofit human services organization cultivates and enables tacit knowledge development toward mission achievement. A community of passionate, mission-minded stakeholders collectively sharing knowledge is at the heart of the organization's knowledge cultivation and enablement. The stakeholders have a holistic understanding of the organization's processes and services, which is important to achieving the mission in the organization. The organization's knowledge cultivation is driven by its unified leadership in creating an environment of: (a) intentional knowledge sharing and learning; (b) open, transparent communication at all levels of the organization; and, (c) tacit and explicit knowledge dependence. The knowledge enablement is driven by its organizational culture which fosters: (a) reliance on experiences and best practices; (b) storytelling to share experiences; (c) collaborative relationships; (d) consistent, planned learning strategies; (e) expectations of tacit knowledge sharing; and, (f) future proofing

mentality. The strategic plan surrounds the activities in the knowledge cultivation and knowledge enablement as a tool for aligning the organizational human capital with its mission and goals.

This framework should be used in studying other nonprofit organizations to determine, among other things, the extent to which the strategic plan supports knowledge cultivation and knowledge enablement and the role that stakeholders play in these knowledge sharing issues to achieve the mission. Additional elements should be added to this framework based on subsequent research findings.

Figure 10. Framework of Tacit Knowledge Cultivation and Enablement Toward Mission Achievement in a Nonprofit Human Services Organization



## CHAPTER 6. RECOMMENDATIONS

The nonprofit human services organization studied presents a great example of the importance that knowledge cultivation and enablement play in ensuring continuation of the organization's mission. The collective cultivation and enablement of knowledge by an organization is of vital importance to furthering the mission and requires the contribution of all stakeholders. This cooperation contributes to the services it provides to children and families, and it is dependent on tacit knowledge, not only to preserve the knowledge of those who are leaving or have left the organization but, more importantly, to continually improve the quality of service for those it serves.

### *Summary of Findings*

In this research, I focused on knowledge cultivation and knowledge enablement of a nonprofit human services organization within the broad topic of knowledge management. The findings of the research include the following: (a) knowledge enabling and cultivating practices are key drivers of human capital value in this organization; (b) elements of Liebowitz's (1999) for-profit organizational knowledge management framework translate to this nonprofit organization; (c) volunteers in the organization do not see their value toward mission achievement as much as employees and board members do; (d) tacit knowledge is the key driver of knowledge in the organization and explicit knowledge is used to document and reinforce the tacit knowledge; (e) the organization's strategic plan guides the organizational knowledge management strategy and is the most significantly used

explicit knowledge document next to the mission statement; and (f) the stakeholders in the organization function as a community in their enablement and cultivation of knowledge toward the organization's mission.

Based on these findings, there are many opportunities for further exploration within the area of knowledge management, particularly the value intangible assets bring to organizations and the value knowledge management practices bring to organizations from a holistic perspective (see Zolingen et al., 2001). I additionally offer suggestions for specific future research within knowledge management in the following text.

### *Future Research*

#### *Mission Driving Tacit Knowledge Enablement and Cultivation*

Tacit knowledge management adds value to this organization's human and intellectual capital through its use of knowledge cultivation and knowledge enablement to encourage stakeholders to share this knowledge. Additionally, focusing on the mission of the organization serves as a non-controlling yet consistent driver for knowledge enablement and cultivation. Further studies are necessary to explore the concept of mission as a driver of tacit knowledge enablement and cultivation within other nonprofit human services organizations.

#### *Expanded Human Capital Development Framework*

Human capital was discussed in the literature as a component of intellectual capital, in addition to the organizational/structural and customer/relational capital components (Barge-Gil et al., 2007; Dzinkowski, 2000; Stovel & Bontis, 2002).

Although Milost (2007) posited that human capital is the driving force of intellectual capital in an organization, I suggest that customer/relational capital in nonprofit organizations should be further examined to explore whether or not the interactions with donors and clients (as a customer/relational component) add value to the organization's intellectual capital. Additionally, the concepts of intellectual, emotional, and social capital can be further explored to determine their contributions to human capital development, as Gratton (2004) suggested.

This research validates the work of Laroche, Merette, and Ruggeri (1999) in their eight tenets of human capital in that the quality of human capital is different for each organization based on how it is gained, acquired, identified, generalized, specialized, employed, and used to influence others in the organization. It is evident that more research is needed in the area of nonprofit organizational knowledge management practices to demonstrate to other nonprofits what can be done to foster knowledge cultivation and enablement, focusing on mission-connectedness and multiple stakeholder involvement, which is unique to organizations in their sector.

#### *More Emphasis on Stakeholder Relationships*

Given the interrelationship between the various stakeholder groups and how they function together to share knowledge, further research of nonprofit organizations could benefit from incorporating a social network analysis. Social network analysis would be beneficial in evaluating patterns or relations among the stakeholder groups and the flow of resources. Social network analysis focuses on the relations or connections between people instead of the attributes of the organization and people, as a component of the organization. Focusing on these



connections or relationships provides new possibilities to assess the social networks inherent in mission-focused human services organizations guided by mission-connected stakeholders (Scott, 2000).

#### *Increased Focus on Volunteers*

Further attention could be spent examining the volunteers' sense of their contribution toward mission achievement in the organization. Although I found that the volunteers in this organization do in fact contribute to the knowledge cultivation and knowledge enabling processes, they did not value their contributions to the mission of the organization as much as they did the employees' contributions. The volunteers are definitely valued in the organization, but deliberately tying that value to how they are helping children and families either directly or indirectly would be beneficial. Additional research exploring the role volunteers play in the cultivating and enabling of tacit knowledge in other nonprofit human services organizations is needed.

#### *Tacit Knowledge Management Strategy Development*

Liebowitz's (1999) framework for tacit knowledge management strategy should be explored in other nonprofit and human services organizations to see if all elements are met in other organizations. Although this framework was developed for corporations, many useful elements can be translated to nonprofit organizations as evidenced by the case developed for this study. A premise of this research was that more needs to be learned about knowledge management within mission-focused nonprofit organizations vis-à-vis stockholder focused for-profit

organizations, appreciating that cross-fertilization of these two sectors will advance the knowledge in this area.

#### *Tacit and Explicit Knowledge Relationship*

Further studies could be conducted focusing on the organizational impact of any of the tacit knowledge management elements discussed in this study, including: collaboration, “bench strength” leadership development, expertise development, and mentoring relationships. Additionally, the role of explicit knowledge in supporting the tacit knowledge development should be explored in other nonprofit human services organizations.

#### *Knowledge Enablement and Cultivation in Nonprofit Organizations*

Using the conceptual model for tacit knowledge cultivation and enablement in Figure 9, other nonprofit human services organizations should be examined and analyzed as to the extent they enable and cultivate knowledge and other elements that are present for this occurrence. Refinements and modifications should be made to this model based on findings in other organizational tacit knowledge management practices.

#### *Strategic Plan Use*

Other nonprofit organizations should be studied to determine their communication and integration of the strategic plan and the impact of this on the organization. The strategic plan in this organization is used as an extension of the mission statement to truly align all organizational stakeholders toward a common focus. The body of knowledge can benefit from more case studies as to the use of the strategic plan in mission-driven organizations.

In addition to the future research suggested, there are a few research issues I present to inform future research designs.

### *Research Issues*

#### *Research Design*

Utilizing the tenets of naturalistic inquiry and interpretive research paradigm, I was able to capture the essence of the stakeholders sharing knowledge collectively as a united group. The four data collection methods I employed to study the stakeholder knowledge in the organization worked very well with each other and without the triangulation between them, I would not have come to the conclusions I did about the collective knowledge sharing by all of the organizational stakeholders.

#### *Board Member Participation*

A proxy was used in this research to represent the voice of board members in the organization. Future studies should attempt to solicit direct participation from individual board members, in lieu of a proxy, to directly capture their voice in the research.

#### *Ethical Issues*

Due to the organization's desire for anonymity, some of the specifics about the organization, such as its services, department names, strategic plan elements, and other identifying characteristics, were changed to more general terminology or omitted to prevent identification of this organization. More detail about the organization's various programs and positions in the organization would have been

possible without this constraint, but preserving anonymity did not impact the overall presentation of the results or discussion of themes emerging from the data.

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**APPENDIX A**  
**CURRICULUM VITA**

## JENNIFER ADEN MURNANE

### EDUCATION

**Iowa State University**, Ames, IA

- Graduated December 2008, **Doctor of Philosophy Degree**  
Family & Consumer Sciences Education, Certificate in Family Financial Planning

**University of Nebraska at Omaha**, Omaha, NE

- Graduated August 1999, **Masters of Business Administration Degree**
- Graduated May 1993, **Bachelor of Science Degree**  
Major: Finance & Banking      Minor: German

### ACADEMIC EXPERIENCE

**Bellevue University**, Bellevue, NE

Assistant Director, Human Capital Lab, August 2007-Present

Assist Lab Director with strategic planning for organization. Coordinate research efforts of faculty members, including funding approval acquisition, resource design consultation, and coordination and communication with external organizations participating in research studies. Serve as publishing supervisor and content contributor for quarterly newsletter. Coordinate quarterly colloquiums including securing of speaker and topic and coordinating marketing efforts. Conduct research with external organizations pertaining to the areas of knowledge management, non-profit organizations and tuition assistance.

Adjunct Professor of Management & Finance, August 2005- Present

Teach traditional and online Business, Management & Finance courses to undergraduate and graduate students.

Director of Program Development, April 2006 – August 2007

Created, coordinated and developed degree programs for the university. Hired, trained and mentored adjunct faculty and determined staffing needs for various programs. Analyzed and recommended changes and enhancements to existing course curriculum. Developed and conducted training courses for university employees on management topics.

**Metropolitan Community College**, Omaha, NE

Adjunct Business & Social Sciences Instructor, August 2001-Present

Teach traditional Finance, Business, and Human Relations courses. Teach Online and Telecourse Business and Finance courses to students. Serve on Financial Planning Advisory Board to assist with program development. Develop course curriculum, create written assignments, projects, oral presentations and examinations.

**College of St. Mary**, Omaha, NE

Adjunct Professor of Business, August 2001-2006

Taught traditional Business and Finance courses to undergraduate students. Taught Online Business courses to students. Served as Independent Study advisor to students. Developed online course curriculum, create written assignments, projects and examinations.

**Creighton University**, Omaha, NE

Adjunct Professor of Finance, August 2001- December 2003

Taught Financial Management courses to undergraduate and graduate students. Developed and graded written assignments, oral presentations and examinations.

## **BUSINESS EXPERIENCE**

### **Ameritrade, Inc., Omaha, NE**

Director, Transfer of Accounts, April 2000 – June 2001

Department Manager, Transfer of Accounts, November 1997 – April 2000

- \* Managed staff of approximately forty associates and three managers
- \* Facilitated strategic and short-term planning efforts for company & department
- \* Interviewed, counseled, mentored and performed other supervisory duties
- \* Implemented quality control program in department
- \* Increased productivity in department by twenty percent
- \* Created efficiencies in department by use of automation and streamlining of procedures
- \* Proposed & implemented several marketing initiatives for company

### **Ameritrade, Inc., Omaha, NE**

Correspondent Services Representative, February 1996 - November 1997

- \* Managed accounts of several large brokerage firms
- \* Coordinated research efforts involving various departments throughout the company
- \* Performed customer service for over 200 licensed brokers

### **McMannama & Associates, Inc. Investment Counsel, Omaha, NE**

Securities Analyst, July 1993 - February 1996

- \* *Series 65 Licensed Investment Adviser*
- \* Prepared research reports based on fundamental analysis of securities for investment committee
- \* Performed equity and fixed income trading in client accounts
- \* Supervised & facilitated firm's registration requirements & compliance with regulatory organizations
- \* Prepared presentations for prospective and existing clients
- \* Developed marketing tools and coordinated marketing program for entire company
- \* Managed firm's payroll, accounts receivable, accounts payable and budget

## **PROFESSIONAL PRESENTATIONS**

Murnane, J.A. & Farner, S. (2008), "Measuring Learning that Matters in Your Organization: Moving Towards a True ROI", workshop at the 5<sup>th</sup> Annual Corporate University Summit, May 19, Las Vegas, Nevada.

Murnane, J.A. (2008) "Learning's Value to the Enterprise", panelist at Chief Learning Officer Breakfast Club, September 11, San Francisco, California.

## **PUBLICATIONS & PAPERS**

Murnane, J.A. (2008). Resocializing adults for their new role: Consumer-citizens. *Journal of Family & Consumer Sciences*, 100(4), 10-16.

Murnane, J.A. (2008, August 5) Why stop at \$5250? *E-Bim Human Resources*.

[http://www.e-bim.com/hr/article.cfm%5CexternalID:261%5CTitle:Why\\_Stop\\_at\\_\\$5,250?%5CAuthor:Jennifer%20Murnane](http://www.e-bim.com/hr/article.cfm%5CexternalID:261%5CTitle:Why_Stop_at_$5,250?%5CAuthor:Jennifer%20Murnane)

Murnane, J.A. & Stark, E. (2008, August 26). Beware the “silver-tongued” salesperson: Hiring using psychometric instruments. *E-Bim Human Resources*.  
[http://www.e-bim.com/hr/article.cfm%5CexternalID:305%5CTitle:Beware the “Silver-Tongued Salesperson”: Hiring Using Psychometric Instruments%5CAuthor:Ernie %20Stark%20and%20Jennifer%20Murnane](http://www.e-bim.com/hr/article.cfm%5CexternalID:305%5CTitle:Beware%20the%20Silver-Tongued%20Salesperson%20Hiring%20Using%20Psychometric%20Instruments%5CAuthor:Ernie%20Stark%20and%20Jennifer%20Murnane)

Murnane, J.A. (2008). Measuring mission enhancement in not-for-profits. *Innovation@Work*, 1 (4), 3.

Hibner, E. & Murnane, J. (2008). Linking corporate tuition assistance programs to business strategy. *Innovation@Work*, 1 (3), 6.

### TEACHING INTERESTS

Economics	Investments
Entrepreneurship	Leadership
Ethics	Organizational Behavior
Financial Calculator Fundamentals	Organizational Development
Financial Institutions	Personal Finance
Financial Management	Principles of Accounting
Fundamentals of Financial Planning	Principles of Management
Human Capital Management	Principles of Marketing
Human Relations	Human Resources Management
Principles of Supervision	Retirement Planning
International Finance	Risk Management
International Marketing	Personal Taxation
Introduction to Business	

### ACTIVITIES/HONORS

- Phi Upsilon Omicron Family & Consumer Sciences Honorary: Member
- Omicron Delta Kappa National Leadership Honorary: Alumni Member
- Financial Planning Association: Member
- Financial Management Association: Member
- American Association of University Women: Member
- American Association of University Professors: Member
- Association for Financial Counseling and Planning Education: Member
- American Association of Family and Consumer Sciences: Member
- Single Parent Homemaker Services and financial literacy program coordinator
- Catholic Charities of Omaha volunteer & financial literacy program coordinator
- 2004 Chi Omega Founding Advisors' Scholarship Recipient
- 2004 Iowa State University Brewer Memorial Scholarship Recipient
- 2005 Iowa State University Bentler Memorial Scholarship Recipient
- 2007 Reviewer for International Journal of Consumer Studies

**APPENDIX B**

**INSTITUTIONAL REVIEW BOARD APPROVAL**

**IOWA STATE UNIVERSITY**  
OF SCIENCE AND TECHNOLOGY

**DATE:** 28 July 2008

**TO:** Jennifer Murnane  
6203 N. 152<sup>nd</sup> Street, Omaha, NE 68116

**CC:** Cheryl Hausafus  
30E MacKay Hall

**FROM:** Jan Canny, IRB Administrator  
Office of Research Assurances

**TITLE:** Valuing Stakeholder Knowledge

**IRB ID:** 08-157

Institutional Review Board  
Office of Research Assurances  
Vice President for Research  
1138 Pearson Hall  
Ames, Iowa 50011-2207  
515 294-4566  
FAX 515 294-4267

**Approval Date:** 28 July 2008  
**Date for Continuing Review:** 27 April 2009

The Chair of the Institutional Review Board of Iowa State University has reviewed and approved the modification of this project. Please refer to the IRB ID number shown above in all correspondence regarding this study.

Your study has been approved according to the dates shown above. To ensure compliance with federal regulations (45 CFR 46 & 21 CFR 56), please be sure to:

- **Use the documents with the IRB approval stamp** in your research.
- **Obtain IRB approval prior to implementing any changes** to the study by completing the "Continuing Review and/or Modification" form.
- **Immediately inform the IRB of (1) all serious and/or unexpected adverse experiences** involving risks to subjects or others; and (2) **any other unanticipated problems involving risks** to subjects or others.
- **Stop all research activity if IRB approval lapses**, unless continuation is necessary to prevent harm to research participants. Research activity can resume once IRB approval is reestablished.
- **Complete a new continuing review form** at least three to four weeks prior to the **date for continuing review** as noted above to provide sufficient time for the IRB to review and approve continuation of the study. We will send a courtesy reminder as this date approaches.

Research investigators are expected to comply with the principles of the Belmont Report, and state and federal regulations regarding the involvement of humans in research. These documents are located on the Office of Research Assurances website [[www.compliance.iastate.edu](http://www.compliance.iastate.edu)] or available by calling (515) 294-4566.

Upon completion of the project, please submit a Project Closure Form to the Office of Research Assurances, 1138 Pearson Hall, to officially close the project.

**APPENDIX C**  
**RESEARCH PROTOCOL**



## **RESEARCH PROTOCOL**

### **I. Overview of Research project**

#### **A. Research Question**

The research focuses on the place that knowledge management, specifically knowledge cultivating and knowledge enabling processes have in a nonprofit have in a nonprofit organization, as a mission-driven entity. The research questions address are as follows:

- (1) What knowledge cultivation and knowledge enabling processes exist within a nonprofit human services organization and how do these processes contribute to mission achievement?
- (2) To what extent does a nonprofit human services organization depend on a combination of explicit and/or tacit knowledge to achieve its mission? and
- (3) What contributions do stakeholders (employees, board members and volunteers) of a nonprofit human services organization make to the knowledge cultivation and knowledge enabling processes in order to achieve the organizational mission?

#### **B. Guiding Theoretical Framework**

1. Nonprofit organizational literature - uniqueness over for-profits
2. Mission focus of nonprofit organization
3. Stakeholder involvement in knowledge cultivation
4. Relation of knowledge to mission of organization
5. Impact on beneficiaries of organizational mission (children & families)

### **II. Field Procedures & Data Collection**

#### **A. Field Procedures**

1. Introductions to managers of various observational activities through gatekeeper
2. Schedule of data collection activities
3. Laptop computer, digital recorder, batteries, notebooks, pens brought to every site visit
4. Bellevue University colleague contact for guidance
5. Provision for unanticipated events and changes in availability of researcher and participants

#### **B. Data Collection Criteria for each Stakeholder Group**

(T) = tacit knowledge measure (E) = explicit knowledge measure

*Overarching goal is to observe how each of these is related to the mission of the organization.*

1. Direct Observation Guide – Training/Orientations
  - a. Expertise (T)
    - i. Use of experts in core areas to explain curriculum
    - ii. Reference to utilizing expert contacts for participants
    - iii. One-on-one and group collaboration opportunities

- iv. Use of mentoring relationships
  - b. Lessons Learned (T)
    - i. Reference to benchmarking, best practices, etc. to apply in situations
    - ii. Use of benchmarking reference to utilizing expert contacts for participants
  - c. Knowledge Documents (E)
    - i. Use of textual knowledge mediums to transfer knowledge
    - ii. Reference to textual knowledge mediums as source of knowledge
    - iii. Use of pictures, drawings, diagrams, presentations, audio, video and online sources as source of knowledge
    - iv. Reference to pictures, drawings, diagrams, presentations, audio, video and online sources to transfer knowledge
  - d. Policies & Procedures (E)
    - i. Use of policies and procedures to guide curriculum
    - ii. Reference to policies and procedures as resource in answering/explaining curriculum
    - iii. Use of policies and procedures as explanatory source
  - e. Data (E)
    - i. Use of facts and figures in curriculum
    - ii. Reference to data retrieved from surveys, studies and other research
    - iii. Reliance on organizational numerical or quantifiable data
2. Direct Observation Guide - Meetings
- a. Expertise (T)
    - i. Reference to utilizing expert contacts for specific issues
    - ii. One-on-one and group collaboration opportunities
    - iii. Use of mentoring relationships
  - b. Lessons Learned (T)
    - i. Reference to benchmarking, best practices, etc. to apply in situations
    - ii. Use of benchmarking reference to utilizing expert contacts for participants
  - c. Knowledge Documents (E)
    - i. Use of textual knowledge mediums to transfer knowledge
    - ii. Reference to textual knowledge mediums as source of knowledge
    - iii. Use of pictures, drawings, diagrams, presentations,

- audio, video and online sources to transfer knowledge
    - iv. Reference to pictures, drawings, diagrams, presentations, audio, video and online sources as source of knowledge
  - d. Policies & Procedures (E)
    - i. Use of policies and procedures to guide meeting conversation
    - ii. Reference to policies and procedures as resource in answering/explaining issues
    - iii. Use of policies and procedures as explanatory source
  - e. Data (E)
    - i. Use of facts and figures in meeting conversation
    - ii. Reference to data retrieved from surveys, studies and other research
    - iii. Reliance on organizational numerical or quantifiable data
3. Document Review Guide
- a. Expertise (T)
    - i. Identification of experts in content areas (directories, organizational charts, etc.)
    - ii. Reference to utilizing expert contacts for participants
  - b. Lessons Learned (T)
    - i. Benchmarking, best practices, etc. to apply in situations
    - ii. One-on-one and group collaboration opportunities
    - iii. Mentoring opportunities
  - c. Knowledge Documents (E)
    - i. Repositories of codified knowledge
    - ii. Externally published reports on organization (industry trends, analyst reports)
    - iii. Reference to textual knowledge mediums as source of knowledge
    - iv. Pictures, drawings, diagrams, presentations, audio, video and online sources of knowledge
  - d. Policies & Procedures (E)
    - i. Policy statements and procedures
    - ii. Reference to policies and procedures as resource in answering/explaining issues
  - e. Data (E)
    - i. Facts and figures about organizational activities
    - ii. Data retrieved from surveys, studies and other research
    - iii. Organizational numerical or quantifiable data
4. Stakeholder Participant Interview Questions
- a. Background

- i. Length of time with organization
  - ii. Role within the organization (staff, volunteer, etc.)
  - iii. Length of time in this position
- b. Story of learning about mission within organization
  - i. based on personal experience (T)
  - ii. not well supported by formal training or doctrine (T)
  - iii. expressed some form of action that initiated learning about the mission (T)
  - iv. learned from written documentation (E)
- c. Story about contribution toward mission of organization
  - i. based on personal experience (T)
  - ii. not well supported by formal training or doctrine (T)
  - iii. expressed some form of action in initiating the contribution toward mission (T)
  - iv. produced something in written form (E)

### **III. Case Study Report Outline**

A. Explanation of knowledge cultivation and knowledge enabling processes within nonprofit human services organization as to their contribution to mission achievement.

1. Description of the cultivation and knowledge enabling processes within nonprofit human services organization as to their contribution to mission achievement.
2. Description of the extent to which nonprofit human services organizations depend on a combination of explicit and/or tacit knowledge to achieve their missions.
  - a. Training Activities
  - b. Meetings
  - c. Orientations
  - d. Participant Interviews
  - e. Related Documents
  - f. Other
3. Description of the contributions of stakeholders of nonprofit human services organization (employees, board members and volunteers) to the knowledge cultivation and knowledge enabling processes in order to achieve the organizational mission.
  - a.. Employees
    - i. Training Activities
    - ii. Meetings
    - iii. Orientations
    - iv. Related Documents
    - v. Participant Interview Themes

- b. Volunteers
  - i. Training Activities
  - ii. Meetings
  - iii. Orientations
  - iv. Related Documents
  - v. Participant Interview Themes
- c. Board Members
  - i. Training Activities
  - ii. Meetings
  - iii. Orientations
  - iv. Related Documents
  - v. Participant Interview Themes

- B. Description of context for research as well as description of nonprofit human services organization
- C. Description of processes observed in the site that are relevant to the research.
- D. Discussion of important elements that are studied in-depth
- E. Discussion of outcomes of the research as well as evolving interpretations related to the site

**APPENDIX D**  
**PRELIMINARY INTERVIEW QUESTIONS**

## PRELIMINARY INTERVIEW QUESTIONS

*I provided the participants a copy of the following research questions for this study to look over and refer to during the interview:*

- (1) What knowledge cultivation and knowledge enabling processes exist within a nonprofit human services organization and how do these processes contribute to mission achievement?
- (2) To what extent does a nonprofit human services organization depend on a combination of explicit and/or tacit knowledge to achieve its mission? and
- (3) What contributions do stakeholders (employees, board members and volunteers) of a nonprofit human services organization make to the knowledge cultivation and knowledge enabling processes in order to achieve the organizational mission?

### Background Information/Questions

How long have you been with the organization?

What is your role within the organization (staff, volunteer, etc.) and how long have you been in this position?

### Knowledge Cultivation/Mission Questions

*I give her/him a copy of the organization's mission to reference.*

Share with me what drew you to this organization and its mission.

Tell me about how you have contributed to achieving the organization's mission through your work/volunteering.

I ask follow on questions based on their answers for them to tell me more about specific parts of the story and to gain insight as to what types of knowledge they refer to and whether the description is of something **tacit** – that is, they are drawing on what is in their brains including knowledge, beliefs, experience, perspectives and values and can be gained by observing and learning from themselves and others and/or **explicit** – drawing on knowledge that has been knowingly transferred to them through written or verbal means.

### Knowledge Employment Questions

*I use five classifications used to discern knowledge management capabilities used in this organization, which is mission-oriented. These classifications include: expertise, lessons learned, written documents, formal policies and procedures, and facts and figures. Based on the outcomes of the above responses, the following may be asked to gain further clarification as to how interviewees employ different kinds of knowledge within their work for the achievement of the organization's mission:*

**(1) Expertise**

Who do you perceive to be the experts within the organization?

Share some stories about your experiences related to finding an expert's perspective within this organization, a perspective that helps you in your work to achieve the mission.

Share your experiences with trying to get tacit information from an expert, knowledge that is in his or her head and not written down.

Share your experiences with trying to obtain written documentation from the organization's experts.

**(2) Lessons Learned**

Describe mentoring opportunities you have experienced within the organization that helped you work towards achieving the mission. Tell me about any times when you have mentored someone to help him or her achieve the mission.

Tell me about any times that you have depended on ways of doing things that are recognized as "the best way to practice."

Share with me lessons you have learned about how to best achieve this organization's mission, including (1) lessons gained from working one-on-one with someone or (2) in collaboration with others.

**(3) Knowledge Documents**

Tell me about any times you have accessed written documents held by the organization, in your work to achieve the mission.

Tell me about any times you have accessed videos, audio tapes, podcasts or other technological documentation of knowledge held by this organization in your work to achieve the mission.

With what externally published reports on the organization (industry trends, analyst reports) are you familiar? Do these help you in your work to achieve the mission of the organization?

Share with me stories of when you have used pictures, drawings, diagrams, presentations, audio, video and/or online sources as forms of knowledge to help you in your work?

Please tell me about any times when you have shared any of the above forms of information with others in the organization, as you work towards achieving the organization's mission?

**(4) Policies & Procedures**

Please share instances of how you have used policy statements and procedures to do your work within the organization.

Under what circumstances would you use policies and procedures as resource in answering/explaining issues instead of tacit knowledge?

**(5) Data**

Share with me about events when you have used facts and figures about this organization's activities to help achieve the mission.

Share with me events when you have used data retrieved from surveys, studies and other research to help you achieve the mission.

Please share with me descriptions of times when you have used other organizational numerical or quantifiable data to help you achieve the mission



**Concluding Question**

Is there any other information you'd like to provide me with in regard to any of the questions I've asked during this interview?

**APPENDIX E**  
**OBSERVATION GUIDE**

## OBSERVATION GUIDE

### DIRECT OBSERVATION-TRAINING/ORIENTATION SESSIONS

#### Expertise

- ☐ Use of experts in core areas to explain curriculum
- ☐ One-on-one and group collaboration opportunities
- ☐ Use of mentoring relationships

#### Lessons Learned

- ☐ Reference to benchmarking, best practices, etc. to apply in situations
- ☐ Reference to benchmarking for problem/issues

#### Knowledge Documents

- ☐ Use of textual knowledge mediums to transfer knowledge
- ☐ Reference to textual knowledge mediums as source of knowledge
- ☐ Use of pictures, drawings, diagrams, presentations, audio, video and online sources as source of knowledge
- ☐ Reference to pictures, drawings, diagrams, presentations, audio, video and online sources to transfer knowledge

#### Policies & Procedures

- ☐ Use of policies and procedures to guide curriculum
- ☐ Reference to policies and procedures as resource in answering/explaining curriculum
- ☐ Use of policies and procedures as explanatory source

#### Data

- ☐ Use of facts and figures in curriculum
- ☐ Reference to data retrieved from surveys, studies and other research
- ☐ Reliance on organizational numerical or quantifiable data

## **OBSERVATION GUIDE**

### **DIRECT OBSERVATION-MEETINGS**

#### Expertise

- ☐ Reference to utilizing expert contacts for specific issues
- ☐ One-on-one and group collaboration opportunities
- ☐ Use of mentoring relationships

#### Lessons Learned

- ☐ Reference to benchmarking, best practices, etc. to apply in situations
- ☐ Use of benchmarking in dealing with issues

#### Knowledge Documents

- ☐ Use of textual knowledge mediums to transfer knowledge
- ☐ Reference to textual knowledge mediums as source of knowledge
- ☐ Use of pictures, drawings, diagrams, presentations, audio, video and online sources to transfer knowledge
- ☐ Reference to pictures, drawings, diagrams, presentations, audio, video and online sources as source of knowledge

#### Policies & Procedures

- ☐ Use of policies and procedures to guide meeting conversation
- ☐ Use of policies and procedures as explanatory source

#### Data

- ☐ Use of facts and figures in meeting conversation
- ☐ Reference to data retrieved from surveys, studies and other research
- ☐ Reliance on organizational numerical or quantifiable data

**APPENDIX F**  
**DOCUMENT REVIEW GUIDE**

## DOCUMENT REVIEW GUIDE

### Expertise

- ☐ Identification of experts in content areas (directories, organizational charts, etc.)
- ☐ One-on-one and group collaboration opportunities
- ☐ Reference to utilizing expert contacts for participants
- ☐ Mentoring opportunities

### Lessons Learned

- ☐ Benchmarking, best practices, etc. to apply in situations
- ☐ Use of benchmarking to address specific issues

### Knowledge Documents

- ☐ Repositories of codified knowledge
- ☐ Externally published reports on organization (industry trends, analyst reports)
- ☐ Reference to textual knowledge mediums as source of knowledge
- ☐ Pictures, drawings, diagrams, presentations, audio, video and online sources of knowledge
- ☐ Pictures, drawings, diagrams, presentations, audio, video and online sources used as source of knowledge

### Policies & Procedures

- ☐ Policy statements and procedures
- ☐ Reference to policies and procedures as resource in answering/explaining issues

### Data

- ☐ Facts and figures about organizational activities
- ☐ Data retrieved from surveys, studies and other research
- ☐ Organizational numerical or quantifiable data

**APPENDIX G**

**SAMPLE RECRUITMENT E-MAIL**

ISU IRB # 1	08-157
Approved Date:	28 April 2008
Expiration Date:	27 April 2009
Initial by:	jlc

To: Potential Research Participant

Your supervisor, <John Smith>, has recommended I contact you for your participation in a research study I am conducting about how <Organization Name> cultivates and values the knowledge of its employees, volunteers and board members toward the overall mission. The topics to be addressed in this study are as follows: (1) knowledge cultivation and knowledge enabling processes within a nonprofit human services organization as to their contribution to mission achievement, (2) the extent to which a nonprofit human service organization depends on a combination of explicit and/or tacit knowledge to achieve its missions, and (3) the contributions of stakeholders of a nonprofit human services organization (employees, board members and volunteers) to the knowledge cultivation and knowledge enabling process in order to achieve the organizational mission.

Your participation in the study is completely voluntary and you are under no obligation to participate. Should you choose to participate, please let me know as soon as possible of your interest. I am available if you have any questions regarding the study. To help you make your decision, I have attached a copy of the informed consent document detailing your potential involvement in this study. If you are available for an interview, please let me know of some convenient times to schedule a 1-hour interview during the weeks of <May 1st through May 10th >.

I will collect a signed copy of the attached document at our scheduled interview time. Thank you in advance for your time.

Sincerely,

Jennifer Murnane, PhD Candidate  
Iowa State University  
402.490.4631  
[jennifer.murnane@bellevue.edu](mailto:jennifer.murnane@bellevue.edu)



**APPENDIX H**  
**INFORMED CONSENT DOCUMENT**

ISU IRB # 1	08-157
Approved Date:	13 May 2008
Expiration Date:	27 April 2009
Initial by:	jlc

### **INFORMED CONSENT DOCUMENT**

**Title of Study:** Accounting for Employee Knowledge in Nonprofit Organizations

**Investigator:** Jennifer Murnane, PhD candidate

This is a research study. Please take your time in deciding if you would like to participate. Please feel free to ask questions at any time.

#### **INTRODUCTION**

The purpose of this study is to learn more about how knowledge is managed within a large human services organization and how this knowledge is valued within the organization. You are being invited to participate in this study because you are currently or have been employed by [REDACTED]

#### **DESCRIPTION OF PROCEDURES**

If you agree to participate in this study, your participation will last for one month and will consist of a 1 hour interview as well as 30 minutes to confirm the accuracy of the transcript of the interview.

During the study you may expect the following study procedures to be followed: I will schedule a time to conduct the interview. I will ask you a series of questions during the 1 hour interview and with your permission, will record the interview on a digital audio recorder. The audio file will then be transcribed into a written format by a third party. The original audio file will be maintained by me, the principal investigator and erased 1 year following my dissertation defense.

#### **RISKS**

While participating in this study you may experience the following risks: There are no foreseeable risks at this time from participating in this study.

#### **BENEFITS**

If you decide to participate in this study there may be a benefit to you in that the study may bring to light your knowledge sharing and knowledge management practices that were previously not considered. It is hoped that the information gained in this study will benefit society by bringing to light the need to examine organizational knowledge management practices as well as the need to examine the value that knowledge and knowledge retention has within organizations.

#### **COSTS AND COMPENSATION**

You will not have any costs from participating in this study and you will not be compensated for participating in this study.

ISU IRB # 1	08-157
Approved Date:	13 May 2008
Expiration Date:	27 April 2009
Initial by:	jlc

### **PARTICIPANT RIGHTS**

Your participation in this study is completely voluntary and you may refuse to participate or leave the study at any time. If you decide to not participate in the study or leave the study early, it will not result in any penalty or loss of benefits to which you are otherwise entitled.

### **CONFIDENTIALITY**

Records identifying participants will be kept confidential to the extent permitted by applicable laws and regulations and will not be made publicly available. However, federal government regulatory agencies, auditing departments of Iowa State University, and the Institutional Review Board (a committee that reviews and approves human subject research studies) may inspect and/or copy your records for quality assurance and data analysis. These records will contain no private information.

To ensure confidentiality to the extent permitted by law, the following measures will be taken: A pseudonym, or fictitious name will be assigned to you prior to the interview and used during the interview to ensure protection of your identity and it will also be used during the transcription process and in the final reporting process. I will have a key linking your real name to your pseudonym, which will be kept in a password protected computer file, accessible only by me. I will maintain this key file for a period of 1 year after my dissertation completion at which time it will be deleted from my hard drive. Your real name and any identifying information will not appear in any supporting documents of this study and if the results are published, your identity will remain confidential as well.

### **QUESTIONS OR PROBLEMS**

You are encouraged to ask questions at any time during this study.

- For further information about the study, contact me at (402) 572-1417 or (402) 557-7875, [jennifer.murnane@bellevue.edu](mailto:jennifer.murnane@bellevue.edu), or one of my major professors Dr. Sue McGregor at (902) 457-6385, [sue.mcgregor@msvu.ca](mailto:sue.mcgregor@msvu.ca) or Dr. Cheryl Hausafus at (515) 294-5307, [haus@iastate.edu](mailto:haus@iastate.edu).
- If you have any questions about the rights of research subjects or research-related injury, please contact the IRB Administrator, (515) 294-4566, [IRB@iastate.edu](mailto:IRB@iastate.edu), or Director, (515) 294-3115, Office of Research Assurances, Iowa State University, Ames, Iowa 50011.

\*\*\*\*\*

### **PARTICIPANT SIGNATURE**

Your signature indicates that you voluntarily agree to participate in this study, that the study has been explained to you, that you have been given the time to read the document and that your questions have been satisfactorily answered. You will receive a copy of the written informed consent prior to your participation in the study.

ISU IRB # 1	08-157
Approved Date:	13 May 2008
Expiration Date:	27 April 2009
Initial by:	jlc

Participant's Name (printed) \_\_\_\_\_

\_\_\_\_\_  
(Participant's Signature)

\_\_\_\_\_  
(Date)

#### INVESTIGATOR STATEMENT

I certify that the participant has been given adequate time to read and learn about the study and all of their questions have been answered. It is my opinion that the participant understands the purpose, risks, benefits and the procedures that will be followed in this study and has voluntarily agreed to participate.

\_\_\_\_\_  
(Signature of Person Obtaining  
Informed Consent)

\_\_\_\_\_  
(Date)

**APPENDIX I**

**INITIAL OPEN CODES AND DEFINITIONS CREATED FROM FIRST DATA  
ANALYSIS ITEM**

## INITIAL OPEN CODES AND DEFINITIONS CREATED FROM FIRST DATA ANALYSIS ITEM

### **Adapting to others' styles**

"The ability to change style to adapt to others in the organization was a valuable trait and respecting the individuality of how things are done."

### **Asking for advice**

"Asking for advice from others working with the youth or leaders to avoid poor outcomes."

### **Board member learning**

"How board members learn about the mission of organization"

### **Communicating mission to others**

"Communicating the mission to others outside the organization"

### **Communicating passion**

"Showing that what you do makes a difference in the lives of children and families"

### **Drawn to mission early**

"This represents the early mission alignment of the person and desire to work toward the mission."

### **Experience from other institutions**

"Outside institutional experience important in doing some jobs at organization."

### **Externally published material**

"Includes newspaper articles, external reports, etc."

### **Facts**

"Knowing specific facts about the organization so as to tell them to others in the community."

### **Feedback sessions**

"Setting aside time to give feedback to improve job performance and mission enhancement."

### **Formal training vs life experience**

"How the age of the employee sometimes doesn't make it possible to have experience, so you must rely on formal training at a young age."

### **Growing the mission**

"How they see the mission growing through their work."

### **Knowing others in organization**

"Getting to know others in the organization and who everyone was."

### **Learning from observing/listening to others**

Watching others in the organization to learn how to perform role or gain information by listening to others talk about it.

### **Learning through training**

"This describes how training helped the employee do her job better by preparing her to deal with the youth and being knowledgeable about how to do her job."

### **Lectures**

"Lectures from experts in the specific areas."

### **Lessons learned**

"Playing back how a situation was handled and discussing how it could be done differently."

### **Miscellaneous**

"Quotes to be evaluated during later stages"

### **Organization as a community**

Describes organization as one place to go for all of your support to do your job and help you in different aspects of it.

**Policies & procedures**

"Utilizing written policies and procedures as to how to do specific things in the job or react during particular situations (emergencies, etc.)"

**Practical experience**

"Using what you have experienced and practiced and applying it to other situations"

**Pre-service training**

"Training received prior to beginning service with organization"

**Relating to the Youth**

"This describes the feeling of using experiences to be able to relate to what the youth are going through."

**Relying on others in organization**

"Relying on the community and network in the organization to help out with various situations."

**Role Playing**

"Using role plays to simulate actual experiences that would occur with youth in the organization."

**Setting an example for youth**

"This describes how the employee was not being a friend to the youth but guiding through example."

**Sharing experiences**

"Drawing from personal experience to help the mission and do their job."

**Sharing knowledge about specific situations**

"Sharing knowledge to help other employees in the organization know what transpired with past interaction with client."

**Sharing stories**

"Using stories of experience or historical stories and sharing those with others inside and outside the organization."

**Strong communication**

"Organization is strong in keeping people in the loop."

**Talking to outsiders from organization**

"Sharing information about the mission with those in the external community."

**Teaching coping skills**

"Teaching youth how to cope with a situation and handle it positively which reflects organization mission."

**Training as foundation**

"Training as foundation for the best way to handle situations but also adapting your own style."

**Using internally published material**

"Using internal newsletters, reports and brochures to learn and share information about the organization."

**Using literature**

"Using literature such as booklets, pamphlets and guidebooks about the organization."

**Using textbooks**

"Using textbooks as a reference and source of knowledge to draw from."

**Utilizing Expertise**

Using the more experienced stakeholders' knowledge to draw from and share their experiences.

**Viewing organization as a community**

"Describes organization as one place to go for all of your support to do your job and help you in different aspects of it."

**Visual Aids**

"Objects used by the organization as symbols of its history"

**Whole community meetings**

"Meetings where all members of organization come together to share knowledge and ideas."

**Working well with others**

"Working well with others required making yourself available and visible and being able to help out when needed."



**APPENDIX J**

**INITIAL AXIAL CODES (CODE FAMILIES) CREATED FROM FIRST DATA  
ANALYSIS ITEM**

## INITIAL AXIAL CODES (CODE FAMILIES) CREATED FROM FIRST DATA ANALYSIS ITEM

### Code Families

---

Code Family: Adaptability to Others

Created: 06/17/08 12:09:14 AM (Super)

Codes (5): [Adapting to others' styles] [Formal training vs life experience] [Knowing others in organization] [Relating to the Youth] [Working well with others]

Quotation(s): 10

---

Code Family: Communicating as Community

Created: 06/17/08 05:18:45 PM (Super)

Codes (2): [Organization as a community] [Strong communication]

Quotation(s): 3

---

Code Family: Communicating Mission to Others

Created: 06/17/08 12:04:54 AM (Super)

Codes (3): [Board member learning] [Sharing stories] [Talking to outsiders from organization]

Quotation(s): 6

---

Code Family: Formal Training

Created: 06/17/08 12:07:13 AM (Super)

Codes (6): [Formal training vs life experience] [Learning through training] [Lectures] [Pre-service training] [Role Playing] [Training as foundation]

Quotation(s): 20

---

Code Family: Miscellaneous

Created: 06/17/08 05:31:21 PM (Super)

Codes (1): [Miscellaneous]

Quotation(s): 7

---

Code Family: Organization as Community

Created: 06/17/08 12:08:23 AM (Super)

Codes (2): [Viewing organization as a community] [Whole community meetings]

Quotation(s): 4

---

Code Family: Passion for Mission

Created: 06/17/08 12:06:22 AM (Super)

Codes (3): [Communicating passion] [Drawn to mission early] [Growing the mission]

Quotation(s): 5

---

Code Family: Practical Experience

Created: 06/17/08 05:26:51 PM (Super)

Codes (3): [Lessons learned] [Practical experience] [Setting an example for youth]

Quotation(s): 4

---

Code Family: Relying on Others' Expertise

Created: 06/17/08 12:09:30 AM (Super)

Codes (6): [Asking for advice] [Experience from other institutions] [Feedback sessions] [Learning from observing/listening to others] [Relying on others in organization] [Utilizing Expertise]

Quotation(s): 18

---

Code Family: Strategies Used on Job

Created: 06/17/08 05:30:14 PM (Super)

Codes (2): [Role Playing] [Teaching coping skills]

Quotation(s): 12

---

Code Family: Using data & facts

Created: 06/17/08 12:11:33 AM (Super)

Codes (2): [Externally published material] [Facts]

Quotation(s): 3

---

Code Family: Using internally Published Material

Created: 06/17/08 05:35:29 PM (Super)

Codes (3): [Using internally published material] [Using literature] [Using textbooks]

Quotation(s): 19

---

Code Family: Using policies & procedures

Created: 06/17/08 05:34:47 PM (Super)

Codes (1): [Policies & procedures]

Quotation(s): 4

---

Code Family: Using visual aids

Created: 06/17/08 05:36:34 PM (Super)

Codes (1): [Visual Aids]

Quotation(s): 2

**APPENDIX K**  
**FINAL OPEN CODES WITH DEFINITIONS**

## FINAL OPEN CODES WITH DEFINITIONS

Code: Abundant information

Created: 07/09/08 09:30:12 PM by Super

Modified: 08/07/08 08:37:38 AM

Families (1): Learning Environment

Quotations: 5

"Referring to having access to a large amount of information in the organization."

Code: Accountability

Created: 07/01/08 07:24:37 PM by Super

Modified: 07/01/08 07:28:11 PM

Families (1): Connecting work to Mission

Quotations: 1

"Being responsible for and making changes based on challenges that arise."

Code: Adapting to others' styles

Created: 06/14/08 09:08:54 PM by Super

Modified: 06/17/08 12:09:20 AM

Families (1): Adaptability to Others

Quotations: 3

"The ability to change style to adapt to others in the organization was a valuable trait and respecting the individuality of how things are done."

Code: Advanced Training

Created: 06/26/08 08:32:49 PM by Super

Modified: 09/01/08 05:09:28 PM

Families (1): Informal Training

Quotations: 2

"Continual training after pre-service training"

Code: Applying previous knowledge

Created: 06/19/08 08:54:20 PM by Super

Modified: 08/09/08 04:26:30 PM

Families (1): Practical Experience

Quotations: 5

"Applying previous knowledge from other jobs in organization and trial and error as to what works and what doesn't work in this organization."

Code: Artifacts

Created: 06/22/08 07:12:22 PM by Super

Modified: 08/06/08 07:00:29 PM

Families (1): Using visual aids

Quotations: 5

"Objects used by the organization as symbols of its history"

Code: Asking for advice

Created: 06/14/08 09:12:36 PM by Super

Modified: 09/01/08 04:49:42 PM

Families (2): Miscellaneous, Relying on Others' Expertise

Quotations: 6

"Asking for advice from others working with the youth or leaders to avoid poor outcomes."

Code: Assessing mission commitment

Created: 07/26/08 09:15:42 PM by Super

Modified: 08/31/08 05:25:52 PM

Families (1): Feelings about Mission

Quotations: 1

"Assessing the level of commitment to organization through self-reflection and benchmarking with peers."

Code: Assisting the board

Created: 07/04/08 11:43:32 AM by Super

Modified: 08/09/08 03:33:54 PM

Families (1): Collaboration

Quotations: 3

"Working to help board support organization's mission"

Code: Being around positive people

Created: 07/24/08 10:09:54 PM by Super

Modified: 08/16/08 05:32:46 PM

Families (1): Adaptability to Others

Quotations: 2

"Being around people who enjoy what they're doing and not hearing bad things about the organization."

Code: Being their best

Created: 06/19/08 09:15:11 PM by Super

Modified: 07/24/08 10:01:12 PM

Families (1): Best Practices

Quotations: 1

"Help every employee being their best at their jobs"

Code: Benchmarking with others

Created: 06/26/08 09:49:58 PM by Super

Modified: 08/17/08 07:35:30 PM

Families (1): Best Practices

Quotations: 2

"Benchmarking with others outside the organization"

Code: Board Member Information

Created: 07/17/08 09:09:02 PM by Super

Modified: 08/17/08 10:44:34 AM

Families (1): Using internally Published Material

Quotations: 9

"Information shared with board members as to biographies and information on programs"

Code: Board member learning

Created: 06/14/08 10:12:12 PM by Super

Modified: 08/15/08 08:25:41 PM

Families (1): Communicating Mission to Others

Quotations: 3

"How board members learn about the mission of organization"

Code: Board member selection

Created: 07/26/08 08:16:32 PM by Super

Modified: 08/21/08 11:04:58 AM

Families (1): Relying on Others' Expertise

Quotations: 8

"How new board members are recommended, chosen and selected in the organization."

Code: Board Structure

Created: 07/26/08 08:14:26 PM by Super

Modified: 08/17/08 07:37:59 PM

Families (1): Using policies & procedures

Quotations: 6

"How the Board of Trustees is comprised and functions."

Code: Budgets

Created: 06/19/08 10:04:26 PM by Super

Modified: 07/04/08 11:52:59 AM

Families (2): Using data & facts, Using financial information

Quotations: 4

"Used to make decisions in organization"

Code: Building bench strength

Created: 08/02/08 08:38:00 PM by Super

Modified: 08/07/08 09:16:34 AM

Families (1): Leadership Development

Quotations: 2

"Talking about building leadership talent to have on the bench and ready to become leaders and managers in the organization."

Code: Changing roles in organization

Created: 07/20/08 03:01:48 PM by Super

Modified: 08/22/08 08:17:17 PM

Families (1): Organizational Experience

Quotations: 6

"Moving into another position - laterally or vertically within the organization."

Code: Changing staff's mindset

Created: 06/19/08 09:00:53 PM by Super

Modified: 09/01/08 05:09:28 PM

Families (1): Critical Thinking

Quotations: 2

"Management explaining reasoning to staff for changing a particular practice."

Code: Cheat sheets

Created: 07/17/08 09:45:55 PM by Super

Modified: 07/23/08 07:41:14 PM

Families (2): Learning Environment, Using internally Published Material

Quotations: 4

"Using sheet with informative data and important information to keep handy and use in daily jobs."

Code: Committee Meetings

Created: 07/26/08 08:34:41 PM by Super

Modified: 08/21/08 11:39:39 AM

Families (1): Collaboration

Quotations: 17

"Meetings for the Board broken out into specific committees for people working on various tasks in organization."

Code: Communicating mission to others

Created: 06/17/08 05:56:44 PM by Super

Modified: 09/14/08 09:57:34 PM

Families (1): Communicating Mission to Others

Quotations: 27

"Communicating the mission to others outside the organization"

Code: Communicating passion

Created: 06/14/08 09:56:52 PM by Super

Modified: 09/14/08 09:57:34 PM

Families (1): Communicating Mission to Others

Quotations: 14

"Showing that what you do makes a difference in the lives of children and families"

Code: Communicating with other stakeholders

Created: 07/06/08 05:38:43 PM by Super

Modified: 09/07/08 09:51:29 PM

Families (3): Communicating as Community, Collaboration, Communication Strategies

Quotations: 25

"Communicating and working with other stakeholder groups in the organization (board w/employees, employees w/volunteers, etc.)"

Code: Communication skills important

Created: 06/26/08 09:56:52 PM by Super

Modified: 08/20/08 09:36:00 AM

Families (1): Communication Strategies

Quotations: 6

"Communicating effectively is an important skill in the position."

Code: Connecting with mission

Created: 07/09/08 09:28:38 PM by Super

Modified: 08/20/08 09:46:27 AM

Families (1): Connecting work to Mission

Quotations: 2

"Learning about impact that the mission has had on others' lives."

Code: Content with current position

Created: 07/04/08 11:48:52 AM by Super

Modified: 07/04/08 12:23:36 PM

Families (1): Miscellaneous

Quotations: 1

"Employees who are satisfied with current position, not desiring upward mobility in organization."

Code: Continual Learning

Created: 06/19/08 09:34:45 PM by Super

Modified: 09/14/08 09:03:55 PM

Families (1): Learning Environment

Quotations: 14



"Being open to learning something new about yourself, people you work with and others, every day."

Code: Creative ideas

Created: 07/02/08 11:17:45 PM by Super

Modified: 09/07/08 09:37:22 PM

Families (2): Critical Thinking, Learning Environment

Quotations: 3

"Examples of encouraging and building on creative ideas of people in the organization."

Code: Critical thinking

Created: 06/19/08 09:02:41 PM by Super

Modified: 07/26/08 09:26:28 PM

Families (1): Critical Thinking

Quotations: 3

"Questioning practices to learn why and what the outcomes are."

Code: Cultivating relationships

Created: 07/04/08 11:37:16 AM by Super

Modified: 07/04/08 12:15:58 PM

Families (1): Connecting work to Mission

Quotations: 1

"Cultivating relationships with donors, visitors, and suppliers in order to achieve goals and relate to mission."

Code: Database

Created: 06/23/08 08:58:52 PM by Super

Modified: 09/15/08 09:27:57 PM

Families (1): Using Technology

Quotations: 1

"Using the organization's National database to do job."

Code: Demonstrating knowledge

Created: 06/23/08 08:40:36 PM by Super

Modified: 07/20/08 08:31:32 PM

Families (1): Practical Experience

Quotations: 6

"Demonstrating knowledge through assessment of skills and expertise."

Code: Department-specific training

Created: 06/26/08 09:03:52 PM by Super

Modified: 08/16/08 04:01:30 PM

Families (1): Informal Training

Quotations: 2

"Training given specific to job roles in individual department."

Code: Department KM practice

Created: 07/04/08 12:02:09 PM by Super

Modified: 07/04/08 12:17:48 PM

Families (1): Sharing Information

Quotations: 1

"Internally developed departmental knowledge sharing practice."

Code: Developing competency  
 Created: 06/23/08 08:55:31 PM by Super  
 Modified: 08/18/08 10:29:21 PM  
 Families (1): Learning Strategies Used  
 Quotations: 3  
 "Being able to demonstrate proficiency in an area"

Code: Different from other departments  
 Created: 06/26/08 08:41:42 PM by Super  
 Modified: 08/17/08 09:53:32 AM  
 Families (1): Miscellaneous  
 Quotations: 4  
 "Not having the same things in common with other departments as to how families are served."

Code: Direct Observation  
 Created: 06/19/08 09:11:31 PM by Super  
 Modified: 06/21/08 02:50:13 PM  
 Families (1): Evaluation Strategies  
 Quotations: 1  
 "Way of looking at behavior of employee and youth to see if skill is being applied"

Code: Diverse backgrounds  
 Created: 07/26/08 08:28:45 PM by Super  
 Modified: 07/26/08 09:47:15 PM  
 Families (1): Relying on Others' Expertise  
 Quotations: 3  
 "Looking for a diverse mix of backgrounds so as to have the appropriate experience and expertise from a variety of different areas."

Code: Donor support  
 Created: 07/04/08 12:09:32 PM by Super  
 Modified: 08/31/08 04:43:58 PM  
 Families (1): Using financial information  
 Quotations: 19  
 "Donor support as important issue in furthering mission through financial support of programs."

Code: Drawn to mission early  
 Created: 06/14/08 08:29:10 PM by Super  
 Modified: 07/08/08 09:58:29 PM  
 Families (1): Feelings about Mission  
 Quotations: 3  
 "This represents the early mission alignment of the person and desire to work toward the mission."

Code: e-Learning  
 Created: 06/19/08 09:45:57 PM by Super  
 Modified: 08/07/08 09:15:56 AM  
 Families (1): Using Technology  
 Quotations: 6  
 "Medium for training employees in organization"

Code: Educating other departments  
 Created: 07/02/08 10:49:20 PM by Super  
 Modified: 08/07/08 09:03:04 AM  
 Families (2): Learning Environment, Sharing Information  
 Quotations: 3  
 "Educating other departments as to processes and things impacting others in the organization."

Code: Effective praise  
 Created: 06/19/08 09:08:37 PM by Super  
 Modified: 06/21/08 02:51:14 PM  
 Families (1): Learning Strategies Used  
 Quotations: 1  
 "Technique used with employees and youth"

Code: Embracing Feedback  
 Created: 06/19/08 09:14:09 PM by Super  
 Modified: 09/14/08 08:57:12 PM  
 Families (1): Learning Strategies Used  
 Quotations: 18  
 "Culture uses feedback extensively as a way of improving and growing and enhancing mission."  
 \*\*\* Merged with: Feedback (2008-08-31T16:12:46) \*\*\*  
 >>-Comment/body for "Feedback":  
 The process of giving advice about situations and daily occurrences in order to make improvements going forward.  
 <<-End of comment/body for "Feedback"

Code: Encouraging others  
 Created: 07/18/08 03:55:47 PM by Super  
 Modified: 07/18/08 04:00:31 PM  
 Families (1): Collaboration  
 Quotations: 1  
 "Encouraging others when going through the learning process, specifically with regard to trainees"

Code: Ethical issues  
 Created: 08/18/08 10:35:17 PM by Super  
 Modified: 08/18/08 10:38:37 PM  
 Families (1): Miscellaneous  
 Quotations: 2  
 "Conflicts of interest and other ethical standards that are expected of stakeholders in the organization."

Code: Evaluation of staff  
 Created: 06/19/08 09:11:31 PM by Super  
 Modified: 08/16/08 03:51:34 PM  
 Families (1): Evaluation Strategies  
 Quotations: 4  
 "Important to know if staff is incorporating behaviors learned to job"

Code: Experience from other institutions  
 Created: 06/14/08 09:28:04 PM by Super  
 Modified: 09/07/08 09:37:22 PM  
 Families (1): Previous Institution Experience

Quotations: 22

"Outside institutional experience important in doing some jobs at the organization."

Code: Experience in organization

Created: 06/26/08 08:25:28 PM by Super

Modified: 09/14/08 08:53:36 PM

Families (1): Organizational Experience

Quotations: 42

"Doing different jobs within the organization and using that experience to help understanding the entire organization."

Code: Experience overriding policy

Created: 06/26/08 08:23:19 PM by Super

Modified: 06/26/08 10:10:45 PM

Families (1): Practical Experience

Quotations: 1

"The instances where experience plays more of a role than policy in deciding how to handle a situation"

Code: External collaboration

Created: 06/19/08 09:38:35 PM by Super

Modified: 09/07/08 09:39:48 PM

Families (1): Collaboration

Quotations: 31

"Working with others from outside the organization"

Code: Externally published material

Created: 06/14/08 10:25:24 PM by Super

Modified: 08/21/08 11:14:14 AM

Families (2): Using data & facts, Using research

Quotations: 23

"Includes newspaper articles, external reports, etc."

Code: Facts

Created: 06/14/08 10:34:05 PM by Super

Modified: 08/20/08 05:47:30 PM

Families (3): Using data & facts, Using research, Learning Strategies Used

Quotations: 12

"Knowing specific facts about the organization so as to tell them to others in the community."

Code: Feeling connected to organization

Created: 06/26/08 09:33:36 PM by Super

Modified: 09/07/08 04:45:24 PM

Families (1): Connecting work to Mission

Quotations: 2

"Feeling connected to organization by involvement with other areas of the organization"

Code: Formal education opportunities

Created: 07/17/08 09:37:25 PM by Super

Modified: 08/07/08 09:16:16 AM

Families (1): Learning Environment

Quotations: 2

"The organization's formal education opportunities for employees to take college courses."

Code: Formal Mentoring

Created: 06/19/08 09:21:28 PM by Super

Modified: 09/14/08 01:29:31 PM

Families (3): Mentoring, Connecting work to Mission, Relying on Others' Expertise

Quotations: 7

"Opportunity for structured and assigned mentors."

Code: Formal training vs life experience

Created: 06/14/08 09:20:55 PM by Super

Modified: 06/17/08 05:16:54 PM

Families (2): Formal Training, Adaptability to Others

Quotations: 3

"How the age of the employee sometimes doesn't make it possible to have experience, so you must rely on formal training at a young age."

Code: Freedom to learn

Created: 06/19/08 09:30:00 PM by Super

Modified: 09/14/08 01:29:31 PM

Families (1): Learning Environment

Quotations: 1

"Getting feedback & making mistakes as supported by the culture as the freedom to learn."

Code: Generalization

Created: 06/19/08 09:07:18 PM by Super

Modified: 08/31/08 04:40:37 PM

Families (1): Learning Strategies Used

Quotations: 2

"Used to help explain how rationale can be applied more broadly in situations rather than just using a technique which can in turn be taught as a skill to youth."

Code: Goals

Created: 06/17/08 05:52:42 PM by Super

Modified: 08/31/08 04:42:40 PM

Families (1): Strategic Plan

Quotations: 26

"Written goals tied to organizational mission"

Code: Growing personally & professionally

Created: 06/19/08 10:06:41 PM by Super

Modified: 08/31/08 04:46:26 PM

Families (2): Leadership support, Learning Environment

Quotations: 2

"Using knowledge to increase personal and professional skills and attributes."

Code: Growing the mission

Created: 06/14/08 10:04:06 PM by Super

Modified: 06/23/08 08:47:56 PM

Families (1): Feelings about Mission

Quotations: 1

"How they see the mission growing through their work."

Code: Hands on training

Created: 06/26/08 09:43:33 PM by Super

Modified: 06/26/08 10:05:07 PM

Families (1): Informal Training

Quotations: 1

"Learning the job as you are doing it"

Code: Heavy reliance on procedures

Created: 06/26/08 08:19:25 PM by Super

Modified: 06/26/08 10:10:25 PM

Families (1): Using policies & procedures

Quotations: 1

"Relying on policies & procedures extensively "

Code: Helping kids & families

Created: 06/26/08 08:11:46 PM by Super

Modified: 09/14/08 09:57:34 PM

Families (1): Feelings about Mission

Quotations: 130

"Wanting to work with or help kids and families through the position in the organization"

Code: Helping other departments

Created: 06/26/08 09:12:32 PM by Super

Modified: 09/07/08 04:45:24 PM

Families (1): Collaboration

Quotations: 10

"Doing tasks in organization for other departments"

Code: Helping others reconnect

Created: 07/08/08 10:00:15 PM by Super

Modified: 07/24/08 09:57:11 PM

Families (1): Feelings about Mission

Quotations: 4

"Describing helping alumni reconnect with the organization they grew up in and were a part of as a child."

Code: Helping understand role

Created: 06/26/08 09:47:32 PM by Super

Modified: 08/31/08 04:50:58 PM

Families (2): Formal Training, Informal Training

Quotations: 2

"Training to help individuals understand their roles in the organization."

Code: Holding meetings

Created: 06/26/08 08:31:00 PM by Super

Modified: 08/21/08 11:32:16 AM

Families (2): Collaboration, Methods of Information Sharing

Quotations: 13

"Meetings to share information with those in same department or area of the organization"

Code: Holding people accountable

Created: 07/04/08 11:52:04 AM by Super

Modified: 08/31/08 04:29:08 PM

Families (1): Miscellaneous

Quotations: 1

"Management philosophy of finding right person for the job and then holding them accountable for what they were hired to do."

Code: Impressed with children

Created: 07/09/08 09:45:10 PM by Super

Modified: 08/13/08 04:16:24 PM

Families (1): Miscellaneous

Quotations: 3

"Reaction to seeing children's appearance and mannerisms"

Code: Improving quality

Created: 06/26/08 08:55:43 PM by Super

Modified: 08/21/08 11:26:56 AM

Families (2): Best Practices, Connecting work to Mission

Quotations: 14

"Increasing quality of job and organizational performance"

Code: Improving skills

Created: 07/20/08 03:04:52 PM by Super

Modified: 07/20/08 03:27:22 PM

Families (1): Learning Strategies Used

Quotations: 1

"Getting better at a task or skills by repeated practicing of it."

Code: Individualized Learning

Created: 06/23/08 08:38:06 PM by Super

Modified: 06/23/08 09:23:54 PM

Families (1): Learning Strategies Used

Quotations: 2

"Plan developing specific training needed at the individual level."

Code: Influence others' lives

Created: 06/19/08 08:51:56 PM by Super

Modified: 06/21/08 02:59:36 PM

Families (1): Connecting work to Mission

Quotations: 1

"Reason for being drawn to mission"

Code: Informal communication driving formal information

Created: 07/06/08 05:34:12 PM by Super

Modified: 07/06/08 05:39:43 PM

Families (1): Communication Strategies

Quotations: 1

"Informal communication creating need for formal documents, presentation or other forms of communication."

Code: Informal Mentoring

Created: 06/19/08 09:23:31 PM by Super

Modified: 08/17/08 10:47:56 AM

Families (2): Mentoring, Relying on Others' Expertise

Quotations: 9

"Helping employee without being assigned as mentor/mentee."

Code: Interactive Learning Technology

Created: 06/23/08 08:50:54 PM by Super

Modified: 06/23/08 09:24:32 PM

Families (1): Using Technology

Quotations: 1

"Learning through interactive technology tools"

Code: Internal Brochures

Created: 07/17/08 08:20:05 PM by Super

Modified: 08/21/08 11:42:48 AM

Families (1): Using internally Published Material

Quotations: 6

"Internally published brochures with information on the organization"

Code: Internal Collaboration

Created: 06/19/08 09:36:30 PM by Super

Modified: 08/21/08 11:46:43 AM

Families (1): Collaboration

Quotations: 31

"A way to learn and transfer knowledge with others internally

\*\*\* Merged with: Internal collaboration (2008-06-26T21:59:46) \*\*\*

>>-Comment/body for "Internal collaboration":

Collaborating with those within the organization

<<-End of comment/body for "Internal collaboration"

Code: Internal Newsletter

Created: 06/14/08 10:24:39 PM by Super

Modified: 09/18/08 11:33:23 AM

Families (2): Methods of Information Sharing, Using internally Published Material

Quotations: 20

"Internally published newsletters used to learn about organization and happenings."

Code: Internal Reports

Created: 07/17/08 08:15:56 PM by Super

Modified: 08/21/08 11:39:20 AM

Families (1): Using internally Published Material

Quotations: 21

"Annual summaries or reports produced internally"

Code: Internal research

Created: 06/19/08 09:43:57 PM by Super

Modified: 07/05/08 04:49:59 PM

Families (1): Using internally Published Material

Quotations: 5

"Referring to internal research as an aid in doing job.

\*\*\* Merged with: Surveys (2008-07-02T23:05:44) \*\*\*

>>-Comment/body for "Surveys":

Using survey feedback in the organization

<<-End of comment/body for "Surveys"



Code: Internally published books  
 Created: 07/17/08 08:37:31 PM by Super  
 Modified: 08/31/08 04:56:22 PM  
 Families (1): Using internally Published Material  
 Quotations: 8  
 "Books published internal to the organization"

Code: Journal  
 Created: 07/17/08 08:27:50 PM by Super  
 Modified: 07/17/08 09:17:16 PM  
 Families (1): Using internally Published Material  
 Quotations: 5  
 "Organization's journal published internally"

Code: Knowing others in organization  
 Created: 06/14/08 10:18:00 PM by Super  
 Modified: 08/13/08 05:08:49 PM  
 Families (1): Adaptability to Others  
 Quotations: 3  
 "Getting to know others in the organization and who everyone was."

Code: Knowing the right person to contact  
 Created: 07/24/08 12:57:35 PM by Super  
 Modified: 08/07/08 08:37:49 AM  
 Families (1): Relying on Others' Expertise  
 Quotations: 2  
 "Learning whom to contact in a specific situation from experience."

Code: Lack of time for learning  
 Created: 07/24/08 01:33:46 PM by Super  
 Modified: 07/24/08 01:35:20 PM  
 Families (1): Informal Training  
 Quotations: 1  
 "Not enough time to learn everything you'd like to in order to assist you in your position."

Code: Learning about History  
 Created: 06/22/08 07:51:38 PM by Super  
 Modified: 08/22/08 08:19:18 PM  
 Families (1): Communicating Mission to Others  
 Quotations: 49  
 "Learning about the mission of the organization through learning about the history."

Code: Learning by doing  
 Created: 07/08/08 10:10:32 PM by Super  
 Modified: 09/14/08 09:35:00 PM  
 Families (1): Learning Environment  
 Quotations: 4  
 "Using trial and error to find best way of doing things."

Code: Learning competencies  
 Created: 06/23/08 08:36:35 PM by Super  
 Modified: 06/23/08 09:23:20 PM  
 Families (1): Learning Strategies Used

Quotations: 2

"Learning objectives for a training program that will be accomplished."

Code: Learning Environment

Created: 06/19/08 09:25:53 PM by Super

Modified: 09/14/08 09:03:55 PM

Families (1): Learning Environment

Quotations: 4

"Organization supports learning as adding value to the organization"

Code: Learning from children

Created: 07/17/08 09:33:51 PM by Super

Modified: 07/26/08 08:55:30 PM

Families (1): Learning Environment

Quotations: 2

"Learning from children and taking something away as they go through their jobs."

Code: Learning from Mistakes

Created: 07/17/08 09:28:26 PM by Super

Modified: 08/09/08 04:29:46 PM

Families (1): Learning Environment

Quotations: 5

"Learning from mistakes as a way of learning the correct way to do something."

Code: Learning from observing/listening to others

Created: 06/14/08 09:54:32 PM by Super

Modified: 09/18/08 11:15:55 AM

Families (1): Relying on Others' Expertise

Quotations: 22

\*\*\* Merged with: Learning from observing others (2008-06-16T22:56:12) \*\*\*

>>-Comment/body for "Learning from observing others":

Watching others in the organization to learn how to perform role or gain information by listening to others talk about it.

<<-End of comment/body for "Learning from observing others"

Code: Learning from self-evaluation

Created: 06/26/08 08:53:56 PM by Super

Modified: 09/07/08 09:50:21 PM

Families (1): Informal Training

Quotations: 17

"Evaluation of own performance in determining how situation was handled and behavior surrounding specific activities."

Code: Learning more from others than book

Created: 07/21/08 10:02:57 AM by Super

Modified: 07/21/08 10:05:04 AM

Families (2): Collaboration, Best Practices

Quotations: 1

"Learning more from hearing how others in similar situations do things than by reading things."

Code: Learning on own

Created: 06/26/08 08:40:22 PM by Super

Modified: 07/26/08 08:55:40 PM  
 Families (1): Informal Training  
 Quotations: 4

"Learning on their own because there wasn't an area in the organization they could go to for advice or expertise."

Code: Learning through training  
 Created: 06/14/08 09:05:35 PM by Super  
 Modified: 08/17/08 10:02:59 AM  
 Families (1): Formal Training  
 Quotations: 17

"This describes how training helped the employee do her job better by preparing her to deal with the youth and being knowledgeable about how to do her job.

\*\*\* Merged with: Learning through experience (2008-06-16T22:53:47) \*\*\*

>>-Comment/body for "Learning through experience":

The employee found out through her experiences that the youth behaved differently than she thought they would.

<<-End of comment/body for "Learning through experience"

Code: Lectures  
 Created: 06/14/08 09:32:10 PM by Super  
 Modified: 06/17/08 12:10:49 AM  
 Families (1): Formal Training  
 Quotations: 1  
 "Lectures from experts in the specific areas."

Code: Legal Documents  
 Created: 07/24/08 01:25:25 PM by Super  
 Modified: 07/24/08 01:26:21 PM  
 Families (1): Using internally Published Material  
 Quotations: 1  
 "Using legal documents to refer back to and run the organization and serve its mission."

Code: Lessons learned  
 Created: 06/14/08 09:40:19 PM by Super  
 Modified: 09/14/08 08:57:12 PM  
 Families (1): Practical Experience  
 Quotations: 5  
 "Playing back how a situation was handled and discussing how it could be done differently."

Code: Making a difference  
 Created: 07/04/08 11:32:25 AM by Super  
 Modified: 08/09/08 04:52:10 PM  
 Families (1): Feelings about Mission  
 Quotations: 3  
 "Referring to those who make a difference with regard to mission achievement in organization."

Code: Making Decisions  
 Created: 08/02/08 08:49:05 PM by Super  
 Modified: 08/31/08 05:04:28 PM  
 Families (1): Learning Environment

Quotations: 1

"Decision making process to indicate who is responsible for what in the organization and different decision making processes."

Code: Maps

Created: 07/17/08 08:21:08 PM by Super

Modified: 08/21/08 11:16:45 AM

Families (1): Using internally Published Material

Quotations: 3

"Using maps to do your job in explaining things to others"

Code: Mechanism to share knowledge

Created: 06/19/08 09:48:57 PM by Super

Modified: 06/21/08 03:02:13 PM

Families (1): Communication Strategies

Quotations: 2

"Way to effectively communicate with multi locations."

Code: Meeting standards

Created: 07/02/08 10:40:52 PM by Super

Modified: 07/02/08 11:27:09 PM

Families (2): Communicating Mission to Others, Strategic Plan

Quotations: 1

"Meeting standards of care within the organization"

Code: Mentoring relationship ongoing

Created: 06/19/08 09:22:44 PM by Super

Modified: 09/01/08 05:09:28 PM

Families (1): Mentoring

Quotations: 4

"Encouraging mentoring relationship to continue on after the formal mentoring is over."

Code: Metaphors

Created: 07/17/08 09:39:03 PM by Super

Modified: 07/17/08 09:59:37 PM

Families (1): Using visual aids

Quotations: 2

"Using metaphors as a way to communicate concepts and information to others."

Code: Miscellaneous

Created: 06/14/08 09:59:25 PM by Super

Modified: 09/18/08 11:19:38 AM

Families (1): Miscellaneous

Quotations: 44

"Quotes to be evaluated during later stages"

Code: Mission development

Created: 06/23/08 09:01:08 PM by Super

Modified: 08/18/08 10:29:39 PM

Families (2): Connecting work to Mission, Communicating Mission to Others

Quotations: 6

"Working toward mission through position"

Code: Model of care knowledge  
 Created: 06/23/08 08:59:44 PM by Super  
 Modified: 09/06/08 07:39:53 PM  
 Families (1): Strategic Plan  
 Quotations: 14  
 "Knowing the model of care and its components."

Code: Modeling  
 Created: 06/19/08 09:31:02 PM by Super  
 Modified: 08/20/08 05:22:19 PM  
 Families (1): Leadership Development  
 Quotations: 2  
 "Informal process of learning from one's supervisor"

Code: Net meetings  
 Created: 06/19/08 09:46:46 PM by Super  
 Modified: 07/06/08 05:29:10 PM  
 Families (1): Using Technology  
 Quotations: 2  
 "Using as a way to conduct knowledge sharing and meetings"

Code: Nurturing relationships  
 Created: 07/02/08 10:38:06 PM by Super  
 Modified: 07/02/08 11:29:27 PM  
 Families (2): Collaboration, Relying on Others' Expertise  
 Quotations: 2  
 "Developing and nurturing relationships with partners"

Code: One-on-one Training  
 Created: 06/26/08 09:01:44 PM by Super  
 Modified: 07/09/08 09:34:01 PM  
 Families (1): Informal Training  
 Quotations: 3  
 "Individual meetings with staff"

Code: Online training  
 Created: 06/23/08 09:08:47 PM by Super  
 Modified: 08/31/08 05:13:22 PM  
 Families (2): Formal Training, Using Technology  
 Quotations: 1

Code: Operational efficiency  
 Created: 07/04/08 11:50:12 AM by Super  
 Modified: 08/31/08 04:29:13 PM  
 Families (1): Miscellaneous  
 Quotations: 2  
 "Running department as efficiently as possible to maximize productivity and minimize costs."

Code: Organization as a community  
 Created: 06/14/08 10:15:04 PM by Super  
 Modified: 09/14/08 09:48:50 PM  
 Families (2): Communicating as Community, Viewing Organization as Community  
 Quotations: 8

\*\*\*\* Merged with: Viewing organization as a community (2008-08-27T10:07:15) \*\*\*

>>-Comment/body for "Viewing organization as a community":  
Describes organization as one place to go for all of your support to do your job and help you in different aspects of it.

<<-End of comment/body for "Viewing organization as a community"

Code: Performance tied to mission

Created: 06/19/08 10:01:13 PM by Super

Modified: 08/20/08 09:47:38 AM

Families (2): Evaluation Strategies, Connecting work to Mission

Quotations: 5

"Encouraging working toward mission with performance review activities."

Code: Personal Behaviors

Created: 06/19/08 10:01:05 PM by Super

Modified: 06/21/08 03:05:14 PM

Families (2): Evaluation Strategies, Connecting work to Mission

Quotations: 1

"One of two ways that employees are evaluated as to how they are achieving their goals in the right way."

Code: Personnel updates

Created: 07/02/08 10:45:46 PM by Super

Modified: 07/02/08 11:30:04 PM

Families (1): Methods of Information Sharing

Quotations: 5

"Changes to existing personnel being communicated throughout organization."

Code: Podcasts

Created: 06/19/08 09:46:05 PM by Super

Modified: 06/21/08 02:17:54 PM

Families (1): Using Technology

Quotations: 2

"Used for recorded messages from organizational leaders."

Code: Policies & procedures

Created: 06/14/08 10:31:47 PM by Super

Modified: 08/20/08 03:08:40 PM

Families (1): Using policies & procedures

Quotations: 55

"Utilizing written policies and procedures as to how to do specific things in the job or react during particular situations (emergencies, etc.)"

\*\*\* Merged with: Rules posted in homes (2008-06-16T22:55:03) \*\*\*

>>-Comment/body for "Rules posted in homes":

Organizational rules and philosophies posted in homes for everyone to see

<<-End of comment/body for "Rules posted in homes"

\*\*\* Merged with: Procedures for Employees (2008-06-26T20:10:00) \*\*\*

>>-Comment/body for "Procedures for Employees":

Specific procedures for helping employees deal with situation

<<-End of comment/body for "Procedures for Employees"

Code: Positioned to Learn

Created: 06/19/08 09:35:34 PM by Super

Modified: 08/06/08 06:55:42 PM

Families (2): Learning Environment, Learning Strategies Used

Quotations: 1

"Being open to and looking for learning new things"

Code: Posting mission and values

Created: 06/19/08 09:51:22 PM by Super

Modified: 08/15/08 08:32:00 PM

Families (1): Using visual aids

Quotations: 5

"Making mission prevalent and available for reference such as in the homes, in offices and hallways for all to see"

Code: Practical experience

Created: 06/14/08 09:31:12 PM by Super

Modified: 09/18/08 11:22:58 AM

Families (1): Practical Experience

Quotations: 6

"Using what you have experienced and practiced and applying it to other situations"

Code: Practicums

Created: 06/23/08 08:41:46 PM by Super

Modified: 06/23/08 09:25:12 PM

Families (1): Practical Experience

Quotations: 7

"Practicing skills on the job prior to performing the job permanently."

Code: Pre-service knowledge of mission

Created: 06/19/08 08:50:27 PM by Super

Modified: 08/22/08 08:55:07 PM

Families (1): Feelings about Mission

Quotations: 13

"Knew about mission before started working there."

Code: Pre-service training

Created: 06/14/08 09:17:14 PM by Super

Modified: 09/18/08 11:24:50 AM

Families (1): Formal Training

Quotations: 10

"Training received prior to beginning service with organization."

Code: Presentations

Created: 06/19/08 09:46:27 PM by Super

Modified: 08/21/08 11:06:43 AM

Families (1): Sharing Information

Quotations: 8

"Formally presenting information to others in the organization usually arranged at a scheduled time and venue."

Code: Press advertisement

Created: 06/19/08 09:52:42 PM by Super

Modified: 06/21/08 03:10:31 PM

Families (1): Using internally Published Material

Quotations: 2

"Displays, descriptions and examples of organization's publications for stakeholders to see."

Code: Public service announcements

Created: 06/19/08 09:51:58 PM by Super

Modified: 06/26/08 09:19:57 PM

Families (2): Communicating Mission to Others, Using internally Published Material

Quotations: 3

"Communicates mission to public as well as stakeholders"

Code: Questioning practice

Created: 06/19/08 08:58:01 PM by Super

Modified: 07/18/08 03:37:10 PM

Families (1): Critical Thinking

Quotations: 1

"Raising question as to why something is done in the organization"

Code: Ready access to information

Created: 06/26/08 08:49:33 PM by Super

Modified: 06/26/08 10:23:45 PM

Families (1): Sharing Information

Quotations: 2

"Information at the staff's fingertips to refer to in their position"

Code: Recognition

Created: 07/08/08 10:24:20 PM by Super

Modified: 07/17/08 08:12:09 PM

Families (1): Miscellaneous

Quotations: 2

"Formally recognizing work done for the organization."

Code: Reflecting positively on organization

Created: 06/26/08 08:29:19 PM by Super

Modified: 08/03/08 08:19:15 AM

Families (2): Connecting work to Mission, Communicating Mission to Others

Quotations: 3

"Positively representing the organization when communicating to others"

Code: Refocusing mission

Created: 06/19/08 09:58:25 PM by Super

Modified: 09/14/08 05:57:31 PM

Families (1): Connecting work to Mission

Quotations: 7

"Looking at those served and trying to do a better job of that by placing emphasis on mission-related activities and whom to serve."

Code: Relating job to other jobs

Created: 07/17/08 08:13:21 PM by Super

Modified: 07/17/08 09:58:07 PM

Families (2): Relying on Others' Expertise, Sharing Information

Quotations: 1

"Understanding how your role fits with other roles in the organization"

Code: Relating to the Youth

Created: 06/14/08 08:59:46 PM by Super



Modified: 08/16/08 05:38:53 PM

Families (1): Adaptability to Others

Quotations: 6

"This describes the feeling of using experiences to be able to relate to what the youth are going through."

Code: Relying on others in organization

Created: 06/14/08 10:14:02 PM by Super

Modified: 09/01/08 05:41:45 PM

Families (1): Relying on Others' Expertise

Quotations: 36

"Relying on the community and network in the organization to help out with various situations."

Code: Research guiding organization

Created: 06/19/08 09:19:23 PM by Super

Modified: 06/21/08 03:14:37 PM

Families (2): Using data & facts, Using research

Quotations: 1

"Using research to validate or invalidate how they are doing things"

Code: Resource for organization

Created: 06/26/08 09:23:48 PM by Super

Modified: 06/26/08 10:06:37 PM

Families (1): Collaboration

Quotations: 1

"Serving as information resource for rest of organization"

Code: Responding quickly to changes

Created: 07/26/08 09:09:21 PM by Super

Modified: 07/26/08 09:47:01 PM

Families (1): Leadership support

Quotations: 1

"The ability to adapt and respond quickly in a non-linear fashion to issues and concerns in organization."

Code: Role Playing

Created: 06/14/08 09:19:04 PM by Super

Modified: 09/03/08 12:01:09 AM

Families (3): Best Practices, Formal Training, Learning Strategies Used

Quotations: 23

"Using role plays to simulate actual experiences that would occur with youth in the organization."

Code: Scripted procedures

Created: 06/17/08 05:54:47 PM by Super

Modified: 08/22/08 08:26:46 PM

Families (1): Using policies & procedures

Quotations: 8

"Specific instructions as to what to say and do with specific type of situation"

Code: Seeing improvement

Created: 07/08/08 10:02:04 PM by Super

Modified: 08/20/08 05:24:00 PM

Families (1): Feelings about Mission

Quotations: 9

"Seeing improvement in the kids you are working with and their progress."

Code: Seeing programs in action

Created: 08/06/08 06:58:50 PM by Super

Modified: 08/06/08 06:59:45 PM

Families (1): Connecting work to Mission

Quotations: 1

"Seeing the Organizational programs and sites as evidence of mission in action"

Code: Sense of Humor

Created: 07/17/08 08:09:16 PM by Super

Modified: 08/27/08 10:41:23 PM

Families (1): Miscellaneous

Quotations: 8

"Using humor as a style in giving examples and communicating information to others in the organization."

Code: Serving as resource for people

Created: 07/08/08 10:21:11 PM by Super

Modified: 07/08/08 10:29:39 PM

Families (1): Sharing Information

Quotations: 1

"Serving as a resource in helping people locate items (such as photographs)."

Code: Serving as role model

Created: 06/23/08 08:46:27 PM by Super

Modified: 08/22/08 08:53:56 PM

Families (2): Mentoring, Leadership Development

Quotations: 3

"Serving as a role model in how to carry out mission"

Code: Serving organization

Created: 07/04/08 12:14:31 PM by Super

Modified: 08/22/08 08:56:16 PM

Families (1): Feelings about Mission

Quotations: 3

"Mentality of serving organization and doing their part."

Code: Setting an example for youth

Created: 06/14/08 09:03:44 PM by Super

Modified: 07/23/08 07:26:33 PM

Families (1): Practical Experience

Quotations: 3

"This describes how the employee was not being a friend to the youth but guiding through example."

Code: Sharing detail

Created: 06/26/08 08:36:16 PM by Super

Modified: 08/21/08 11:40:13 AM

Families (1): Sharing Information

Quotations: 7

"Giving the right amount of information to help someone do their job while not bogging them down in details."

Code: Sharing experiences

Created: 06/14/08 09:51:14 PM by Super

Modified: 09/14/08 09:57:34 PM

Families (1): Practical Experience

Quotations: 26

"Drawing from personal experience to help the mission and do their job."

Code: Sharing information

Created: 06/26/08 09:00:58 PM by Super

Modified: 08/22/08 08:58:34 PM

Families (1): Sharing Information

Quotations: 31

"Sharing information and updates with others in the organization"

Code: Sharing information with 24 hr staff

Created: 06/26/08 09:52:50 PM by Super

Modified: 06/26/08 10:06:51 PM

Families (1): Communication Strategies

Quotations: 2

"Sharing information with 24 hour staff so they are aware of everything going on in the organization when they get after-hours calls"

Code: Sharing knowledge about specific situations

Created: 06/17/08 05:58:01 PM by Super

Modified: 06/26/08 09:54:36 PM

Families (2): Documenting situation, Learning Strategies Used

Quotations: 4

"Sharing knowledge to help other employees in the organization know what transpired with past interaction with client."

Code: Sharing reflections

Created: 07/26/08 09:34:32 PM by Super

Modified: 08/13/08 04:35:26 PM

Families (1): Methods of Information Sharing

Quotations: 2

"Sharing written or oral reflections on experience in organization and suggestions for improvement."

Code: Sharing stories

Created: 06/14/08 10:02:39 PM by Super

Modified: 09/18/08 11:28:28 AM

Families (1): Communicating Mission to Others

Quotations: 28

"Using stories of experience or historical stories and sharing those with others inside and outside the organization."

Code: Sharing volunteer work

Created: 07/08/08 10:17:43 PM by Super

Modified: 07/24/08 10:07:39 PM

Families (1): Communicating as Community

Quotations: 4

"Sharing volunteer work experience with friends and family and encouraging their participation."

Code: Shift from policy to people

Created: 06/19/08 09:17:34 PM by Super

Modified: 07/02/08 11:14:45 PM

Families (1): Connecting work to Mission

Quotations: 4

"Letting the group it serves have more importance than policies or regulations"

Code: Span of control

Created: 06/26/08 08:05:29 PM by Super

Modified: 08/31/08 04:29:19 PM

Families (1): Miscellaneous

Quotations: 1

"The number of people supervised"

Code: Specialty based knowledge

Created: 06/23/08 08:43:41 PM by Super

Modified: 08/31/08 05:40:46 PM

Families (1): Formal Training

Quotations: 5

"Knowledge of specialization not specific to Organization"

Code: Strategic plan

Created: 06/19/08 09:44:36 PM by Super

Modified: 09/14/08 06:30:45 PM

Families (1): Strategic Plan

Quotations: 50

"Working toward long term goals of organization and using this plan and being responsible for its implementation"

Code: Strong communication

Created: 06/14/08 10:38:28 PM by Super

Modified: 07/26/08 09:31:52 PM

Families (1): Communicating as Community

Quotations: 4

"Organization is strong in keeping people in the loop."

Code: Suggested ways of doing things

Created: 06/19/08 09:31:53 PM by Super

Modified: 09/08/08 10:29:20 PM

Families (2): Best Practices, Relying on Others' Expertise

Quotations: 11

"Constantly evaluating to find best way of doing things."

Code: Supervision process

Created: 06/19/08 09:24:44 PM by Super

Modified: 07/02/08 11:13:47 PM

Families (1): Leadership Development

Quotations: 8

"Process of ongoing discussions with supervisor/subordinate to discuss performance and development"

Code: Supporting others

Created: 07/04/08 11:38:45 AM by Super

Modified: 07/24/08 12:44:21 PM

Families (1): Connecting work to Mission

Quotations: 3

"Supporting others who are more directly tied to families and kids in their work to achieve the mission."

Code: Supportive Leadership

Created: 06/19/08 09:40:21 PM by Super

Modified: 08/21/08 11:26:27 AM

Families (2): Leadership support, Learning Environment

Quotations: 10

"Leadership supporting learning efforts"

Code: Talking to outsiders from organization

Created: 06/14/08 09:55:27 PM by Super

Modified: 09/18/08 11:30:17 AM

Families (1): Communicating Mission to Others

Quotations: 9

"Sharing information about the mission with those in the external community."

Code: Teaching coping skills

Created: 06/14/08 09:47:57 PM by Super

Modified: 08/31/08 05:41:29 PM

Families (1): Learning Strategies Used

Quotations: 3

"Teaching youth how to cope with a situation and handle it positively which reflects organization's mission."

Code: Techniques to Behaviors emphasis

Created: 06/19/08 08:56:08 PM by Super

Modified: 06/21/08 03:18:17 PM

Families (1): Learning Strategies Used

Quotations: 5

"Changing the emphasis from just focusing on the techniques to look at the behavior outside of some of the techniques."

Code: Time spent volunteering

Created: 07/08/08 10:03:08 PM by Super

Modified: 08/31/08 05:42:30 PM

Families (1): Miscellaneous

Quotations: 2

"Length of time spent volunteering in the organization."

Code: Training as foundation

Created: 06/14/08 09:22:48 PM by Super

Modified: 08/16/08 03:45:32 PM

Families (1): Formal Training

Quotations: 4

"Training as foundation for the best way to handle situations but also adapting your own style."

Code: Training leaders

Created: 06/23/08 08:34:56 PM by Super

Modified: 09/03/08 10:03:03 PM

Families (1): Leadership Development

Quotations: 13

"Training future leaders in the organization so they are prepared for their roles."

Code: Training Manuals

Created: 07/02/08 10:54:30 PM by Super

Modified: 08/16/08 03:57:47 PM

Families (1): Using internally Published Material

Quotations: 18

"Manual used as a source to refer back to in doing someone's job."

Code: Training to emphasize rationale

Created: 06/19/08 09:03:48 PM by Super

Modified: 08/01/08 10:45:51 AM

Families (1): Critical Thinking

Quotations: 4

"Looking at the rationale behind the technique that was emphasized in training as a way of getting people to look at things differently."

Code: Training Website

Created: 06/19/08 09:45:20 PM by Super

Modified: 08/07/08 08:46:43 AM

Families (1): Using Technology

Quotations: 9

"University intranet portal for training and information dissemination purposes."

Code: Turning Practices into Policy

Created: 06/26/08 08:17:38 PM by Super

Modified: 06/26/08 10:02:11 PM

Families (1): Using policies & procedures

Quotations: 2

"Turning things that are done every day into policy"

Code: Using CD's

Created: 06/26/08 08:59:03 PM by Super

Modified: 06/26/08 10:02:35 PM

Families (1): Using Technology

Quotations: 3

"Using CD's to listen to calls done"

Code: Using computer

Created: 06/26/08 09:40:43 PM by Super

Modified: 08/22/08 08:50:24 PM

Families (1): Using Technology

Quotations: 16

"Using this to learn job"

Code: Using financial data

Created: 06/19/08 09:43:10 PM by Super

Modified: 09/14/08 05:16:26 PM

Families (2): Using data & facts, Using financial information  
 Quotations: 33

"Using financial data to refer back to in making decisions"

Code: Using literature

Created: 06/14/08 09:52:52 PM by Super

Modified: 07/20/08 02:44:56 PM

Families (1): Using internally Published Material

Quotations: 6

"Using literature such as booklets, pamphlets and guidebooks about the organization."

Code: Using photographs

Created: 07/09/08 09:19:35 PM by Super

Modified: 08/13/08 05:06:04 PM

Families (1): Using internally Published Material

Quotations: 8

"Using photographs to share information about the organization."

Code: Using statistics

Created: 06/19/08 09:42:04 PM by Super

Modified: 08/22/08 08:22:34 PM

Families (3): Using data & facts, Using research, Using internally Published Material

Quotations: 46

"Using statistics as an aid in doing job."

Code: Using textbooks

Created: 06/14/08 09:29:49 PM by Super

Modified: 07/24/08 09:55:13 PM

Families (1): Using internally Published Material

Quotations: 20

"Using textbooks as a reference and source of knowledge to draw from."

Code: Using webinars

Created: 07/24/08 01:29:52 PM by Super

Modified: 07/24/08 01:31:16 PM

Families (1): Using Technology

Quotations: 2

"Using webinars as a source of learning new information about the organization or specific material."

Code: Using your gut

Created: 07/18/08 03:41:41 PM by Super

Modified: 08/16/08 05:31:56 PM

Families (1): Best Practices

Quotations: 2

"A phrase used by a stakeholder to explain how sometimes this is more important in skill development and application."

Code: Utilizing Expertise

Created: 06/14/08 10:18:34 PM by Super

Modified: 09/18/08 11:36:11 AM

Families (1): Relying on Others' Expertise

Quotations: 45

"Meetings with experts in specific areas sharing knowledge.  
 \*\*\* Merged with: Utilizing Expertise (2008-06-16T23:05:20) \*\*\*

>>-Comment/body for "Utilizing Expertise":

Using the more experienced stakeholders' knowledge to draw from and share their experiences.

<<-End of comment/body for "Utilizing Expertise"

Code: Values

Created: 07/01/08 07:17:27 PM by Super

Modified: 08/17/08 10:51:40 AM

Families (1): Connecting work to Mission

Quotations: 8

"What is important to the organization's mission spelled out with specific values desired in order achieve this mission."

Code: Videos

Created: 06/19/08 09:46:12 PM by Super

Modified: 08/16/08 01:48:21 PM

Families (1): Using Technology

Quotations: 23

"Using videos to communicate information"

Code: Visual Aids

Created: 06/14/08 10:28:22 PM by Super

Modified: 08/21/08 11:15:39 AM

Families (1): Using visual aids

Quotations: 28

"Graphs, charts, visual aids used to do their job and aid in mission."

Code: Volunteer contributions

Created: 07/04/08 11:45:54 AM by Super

Modified: 09/14/08 06:44:11 PM

Families (1): Relying on Others' Expertise

Quotations: 14

"Understanding importance of volunteer contributions to helping further mission of the organization."

Code: Web-based knowledge tool

Created: 07/26/08 08:52:53 PM by Super

Modified: 07/26/08 09:43:41 PM

Families (1): Using Technology

Quotations: 2

"Tool used to coordinate and store knowledge for others to see."

Code: Whole community meetings

Created: 06/14/08 10:16:14 PM by Super

Modified: 07/23/08 07:21:55 PM

Families (1): Viewing Organization as Community

Quotations: 4

"Meetings where all members of organization come together to share knowledge and ideas."

Code: Working well with others

Created: 06/14/08 09:11:17 PM by Super

Modified: 08/18/08 10:32:16 PM



Families (1): Adaptability to Others

Quotations: 7

"Working well with others required making yourself available and visible and being able to help out when needed."

Code: Working with alumni

Created: 07/09/08 09:22:31 PM by Super

Modified: 07/23/08 07:25:28 PM

Families (1): Communicating Mission to Others

Quotations: 2

"Working with alumni who come back to the organization."

**APPENDIX L**  
**FINAL AXIAL CODES (CODE FAMILIES)**

## FINAL AXIAL CODES (CODE FAMILIES)

### Code Families

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HU: Mission Achievement through KM in NPO  
 File: [C:\Documents and Settings\murnane\My Documents\Scienti...\Mission Achievement through KM in NPO.hpr5]  
 Edited by: Super  
 Date/Time: 09/18/08 11:42:18 AM

---

Code Family: Adaptability to Others  
 Created: 06/17/08 12:09:14 AM (Super)

Comment:

There is a particular style and personality described that allows those in the organization to be flexible and relate to other stakeholders and the groups it serves.

Codes (6): [Adapting to others' styles] [Being around positive people] [Formal training vs life experience] [Knowing others in organization] [Relating to the Youth] [Working well with others]

Quotation(s): 24

---

Code Family: Best Practices  
 Created: 06/21/08 02:19:01 PM (Super)

Comment:

The desire to improve organizational practices and seek out the best ways of dealing with various situations.

Codes (7): [Being their best] [Benchmarking with others] [Improving quality] [Learning more from others than book] [Role Playing] [Suggested ways of doing things] [Using your gut]

Quotation(s): 54

---

Code Family: Collaboration  
 Created: 06/21/08 02:40:30 PM (Super)

Comment:

An aim of the organization to continually work with others within and outside of the organization to produce the best ideas and ways of doing things.

Codes (11): [Assisting the board] [Committee Meetings] [Communicating with other stakeholders] [Encouraging others] [External collaboration] [Helping other departments] [Holding meetings] [Internal Collaboration] [Learning more from others than book] [Nurturing relationships] [Resource for organization]

Quotation(s): 129

---

Code Family: Communicating as Community  
 Created: 06/17/08 05:18:45 PM (Super)

Comment:

Community aspect of the organization in that it is "more than just a job" and everyone pitches in together to help.

Codes (4): [Communicating with other stakeholders] [Organization as a community] [Sharing volunteer work] [Strong communication]

Quotation(s): 41

---

Code Family: Communicating Mission to Others  
 Created: 06/17/08 12:04:54 AM (Super)

Comment:

The manner of sharing the organizational mission with those outside the organization as well as stakeholders in the organization.

Codes (11): [Board member learning] [Communicating mission to others] [Communicating passion] [Learning about History] [Meeting standards] [Mission development] [Public service announcements] [Reflecting positively on organization] [Sharing stories] [Talking to outsiders from organization] [Working with alumni]

Quotation(s): 141

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## Code Family: Communication Strategies

Created: 06/21/08 02:47:45 PM (Super)

Comment:

Ways of communication with others within the organization.

Codes (5): [Communicating with other stakeholders] [Communication skills important] [Informal communication driving formal information] [Mechanism to share knowledge] [Sharing information with 24 hr staff]

Quotation(s): 35

## Code Family: Connecting work to Mission

Created: 06/21/08 02:59:28 PM (Super)

Comment:

Ways in which tasks, jobs, etc. are aimed at enhancing the mission.

Codes (16): [Accountability] [Connecting with mission] [Cultivating relationships] [Feeling connected to organization] [Formal Mentoring] [Improving quality] [Influence others' lives] [Mission development] [Performance tied to mission] [Personal Behaviors] [Reflecting positively on organization] [Refocusing mission] [Seeing programs in action] [Shift from policy to people] [Supporting others] [Values]

Quotation(s): 65

## Code Family: Critical Thinking

Created: 06/21/08 02:43:13 PM (Super)

Comment:

Questioning practices and looking for continual improvement within organization.

Codes (5): [Changing staff's mindset] [Creative ideas] [Critical thinking] [Questioning practice] [Training to emphasize rationale]

Quotation(s): 13

## Code Family: Documenting situation

Created: 06/21/08 05:08:32 PM (Super)

Comment:

Writing down information that is then shared with others to help them do their jobs better.

Codes (1): [Sharing knowledge about specific situations]

Quotation(s): 4

## Code Family: Evaluation Strategies

Created: 06/21/08 02:47:57 PM (Super)

Comment:

Ways stakeholders within the organization are evaluated with regard to their performance.

Codes (4): [Direct Observation] [Evaluation of staff] [Performance tied to mission] [Personal Behaviors]

Quotation(s): 9

## Code Family: Feelings about Mission

Created: 06/17/08 12:06:22 AM (Super)

Comment:

How stakeholders feel about mission.

Codes (9): [Assessing mission commitment] [Drawn to mission early] [Growing the mission] [Helping kids &amp; families] [Helping others reconnect] [Making a difference] [Pre-service knowledge of mission] [Seeing improvement] [Serving organization]

Quotation(s): 160

## Code Family: Formal Training

Created: 06/17/08 12:07:13 AM (Super)

Comment:

Formal training opportunities in the organization

Codes (9): [Formal training vs life experience] [Helping understand role] [Learning through training] [Lectures] [Online training] [Pre-service training] [Role Playing] [Specialty based knowledge] [Training as foundation]  
 Quotation(s): 64

---

Code Family: Informal Training

Created: 06/26/08 10:03:58 PM (Super)

Comment:

Training that does not occur in the classroom specifically and is unplanned

Codes (8): [Advanced Training] [Department-specific training] [Hands on training] [Helping understand role] [Lack of time for learning] [Learning from self-evaluation] [Learning on own] [One-on-one Training]

Quotation(s): 32

---

Code Family: Leadership Development

Created: 06/21/08 03:02:39 PM (Super)

Comment:

Training and developing future leaders in the organization through formal and informal processes

Codes (5): [Building bench strength] [Modeling] [Serving as role model] [Supervision process] [Training leaders]

Quotation(s): 27

---

Code Family: Leadership support

Created: 06/21/08 03:16:25 PM (Super)

Comment:

Support from upper levels of the organization for furthering the mission.

Codes (3): [Growing personally & professionally] [Responding quickly to changes] [Supportive Leadership]

Quotation(s): 13

---

Code Family: Learning Environment

Created: 06/21/08 02:49:51 PM (Super)

Comment:

Promoting formal and informal learning within the organization

Codes (15): [Abundant information] [Cheat sheets] [Continual Learning] [Creative ideas] [Educating other departments] [Formal education opportunities] [Freedom to learn] [Growing personally & professionally] [Learning by doing] [Learning Environment] [Learning from children] [Learning from Mistakes] [Making Decisions] [Positioned to Learn] [Supportive Leadership]

Quotation(s): 56

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Code Family: Learning Strategies Used

Created: 06/17/08 05:30:14 PM (Super)

Comment:

Ways of transferring knowledge and learning within the organization

Codes (13): [Developing competency] [Effective praise] [Embracing Feedback] [Facts] [Generalization] [Improving skills] [Individualized Learning] [Learning competencies] [Positioned to Learn] [Role Playing] [Sharing knowledge about specific situations] [Teaching coping skills] [Techniques to Behaviors emphasis]

Quotation(s): 76

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Code Family: Mentoring

Created: 06/21/08 02:54:43 PM (Super)

Comment:

Formal and informal knowledge sharing within the organization

Codes (4): [Formal Mentoring] [Informal Mentoring] [Mentoring relationship ongoing] [Serving as role model]

Quotation(s): 23

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## Code Family: Methods of Information Sharing

Created: 07/02/08 11:29:55 PM (Super)

## Comment:

Ways of transmitting information to others in their organization

Codes (4): [Holding meetings] [Internal Newsletter] [Personnel updates] [Sharing reflections]

Quotation(s): 40

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## Code Family: Miscellaneous

Created: 06/17/08 05:31:21 PM (Super)

## Comment:

Extra quotes with no home

Codes (12): [Asking for advice] [Content with current position] [Different from other departments] [Ethical issues] [Holding people accountable] [Impressed with children] [Miscellaneous] [Operational efficiency] [Recognition] [Sense of Humor] [Span of control] [Time spent volunteering]

Quotation(s): 75

---

## Code Family: Organizational Experience

Created: 06/26/08 10:00:49 PM (Super)

## Comment:

The experience gained within the organization to assist people in performing their duties and relating those experiences to various activities.

Codes (2): [Changing roles in organization] [Experience in organization]

Quotation(s): 47

---

## Code Family: Practical Experience

Created: 06/17/08 05:26:51 PM (Super)

## Comment:

Using experience in the organization to perform job

Codes (8): [Applying previous knowledge] [Demonstrating knowledge] [Experience overriding policy] [Lessons learned] [Practical experience] [Practicums] [Setting an example for youth] [Sharing experiences]

Quotation(s): 59

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## Code Family: Previous Institution Experience

Created: 06/21/08 01:39:55 PM (Super)

## Comment:

Using experience gained from other institutions to apply to this one.

Codes (1): [Experience from other institutions]

Quotation(s): 22

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## Code Family: Relying on Others' Expertise

Created: 06/17/08 12:09:30 AM (Super)

## Comment:

Using others' experiences, advice, suggestions and guidance in solving a particular issue or finding the best way to deal with things.

Codes (13): [Asking for advice] [Board member selection] [Diverse backgrounds] [Formal Mentoring] [Informal Mentoring] [Knowing the right person to contact] [Learning from observing/listening to others] [Nurturing relationships] [Relating job to other jobs] [Relying on others in organization] [Suggested ways of doing things] [Utilizing Expertise] [Volunteer contributions]

Quotation(s): 154

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## Code Family: Sharing Information

Created: 06/26/08 10:23:19 PM (Super)

Codes (8): [Department KM practice] [Educating other departments] [Presentations] [Ready access to information] [Relating job to other jobs] [Serving as resource for people] [Sharing detail] [Sharing information]

Quotation(s): 52

---

Code Family: Strategic Plan

Created: 06/21/08 03:21:47 PM (Super)

Comment:

Organization's strategic plan communicated throughout organization and aimed at growing mission.

Codes (4): [Goals] [Meeting standards] [Model of care knowledge] [Strategic plan]

Quotation(s): 85

---

Code Family: Using data & facts

Created: 06/17/08 12:11:33 AM (Super)

Comment:

Using data and facts to carry out role in the organization, to inform how they do their job and to communicate important issues to others.

Codes (6): [Budgets] [Externally published material] [Facts] [Research guiding organization] [Using financial data] [Using statistics]

Quotation(s): 115

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Code Family: Using financial information

Created: 06/21/08 02:21:34 PM (Super)

Comment:

Using financial information to help in carrying out their role in the organization, making decisions in the best interest of the organization and achieving mission.

Codes (3): [Budgets] [Donor support] [Using financial data]

Quotation(s): 56

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Code Family: Using internally Published Material

Created: 06/17/08 05:35:29 PM (Super)

Comment:

Using information published from within the organization as a source of information, communication medium and to assist in decision making to achieve best outcomes for organization and its mission.

Codes (17): [Board Member Information] [Cheat sheets] [Internal Brochures] [Internal Newsletter] [Internal Reports] [Internal research] [Internally published books] [Journal] [Legal Documents] [Maps] [Press advertisement] [Public service announcements] [Training Manuals] [Using literature] [Using photographs] [Using statistics] [Using textbooks]

Quotation(s): 167

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Code Family: Using policies & procedures

Created: 06/17/08 05:34:47 PM (Super)

Comment:

Using policies and procedures in fulfilling role within the organization, communicating with others, transferring information in order to fulfill organization's mission.

Codes (5): [Board Structure] [Heavy reliance on procedures] [Policies & procedures] [Scripted procedures] [Turning Practices into Policy]

Quotation(s): 69

---

Code Family: Using research

Created: 06/21/08 03:13:27 PM (Super)

Comment:

Using research done externally or internally to perform role in the organization, make decisions and act in the best interest of the organization to achieve its mission

Codes (4): [Externally published material] [Facts] [Research guiding organization] [Using statistics]

Quotation(s): 78

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**Code Family: Using Technology**

Created: 06/21/08 02:17:36 PM (Super)

**Comment:**

Using technology to share information, communicate, transfer knowledge and perform role in order to achieve organization's mission.

Codes (12): [Database] [e-Learning] [Interactive Learning Technology] [Net meetings] [Online training] [Podcasts] [Training Website] [Using CD's] [Using computer] [Using webinars] [Videos] [Web-based knowledge tool]

Quotation(s): 66

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**Code Family: Using visual aids**

Created: 06/17/08 05:36:34 PM (Super)

**Comment:**

Using visual aids in transferring knowledge and communicating with others in the organization.

Codes (4): [Artifacts] [Metaphors] [Posting mission and values] [Visual Aids]

Quotation(s): 39

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**Code Family: Viewing Organization as Community**

Created: 06/17/08 12:08:23 AM (Super)

**Comment:**

The organization behaving as a community, dependent on one another

Codes (2): [Organization as a community] [Whole community meetings]

Quotation(s): 11